

BBG Research Series



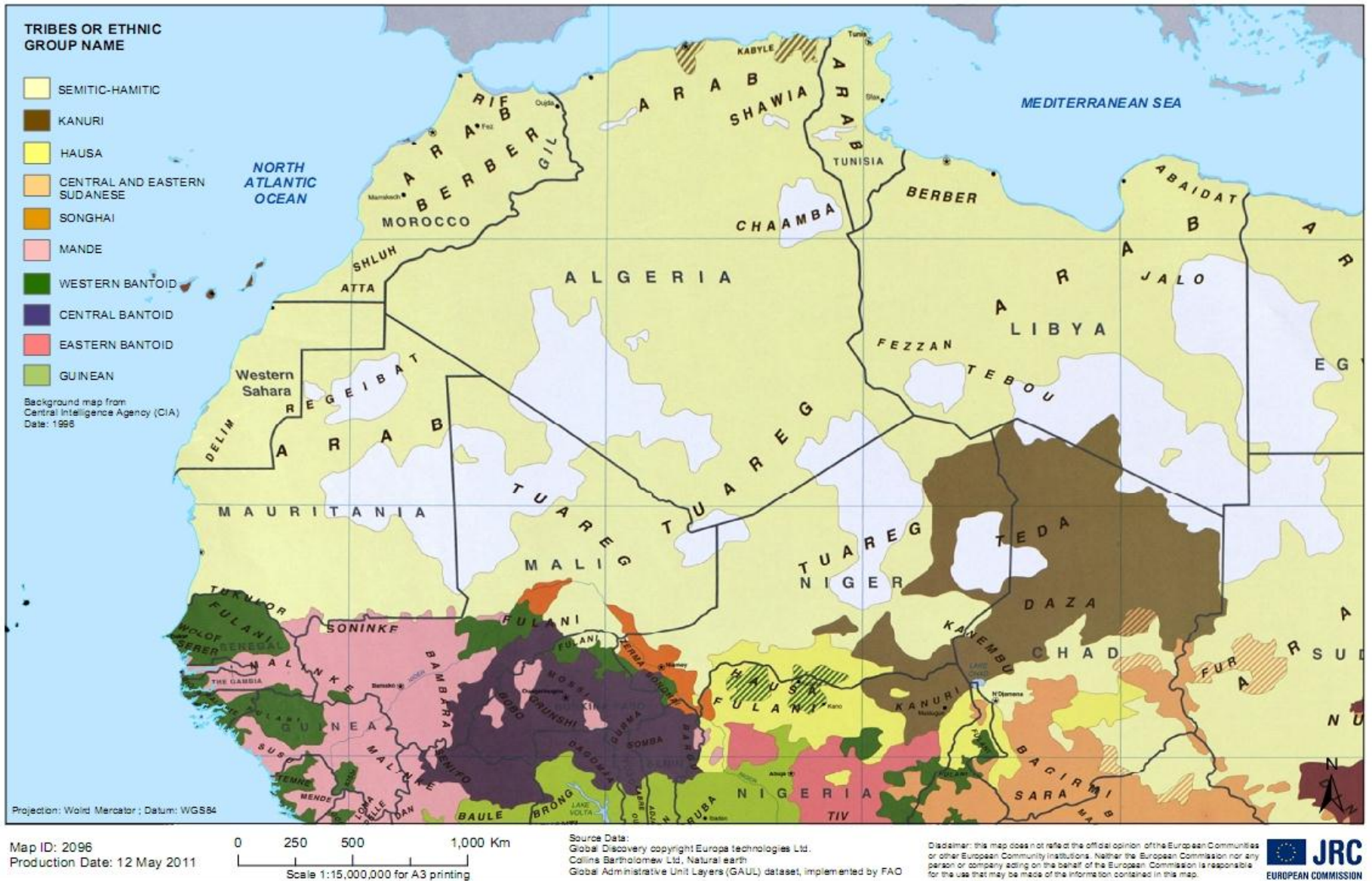
Global Hotspots: Media Use in Mali and Somalia 2013



Sahel at a Glance

Findings from the World Poll

SAHEL REGIONAL MAP (Ethnolinguistic Groups)



Sahel in the News

- Political instability
- Terrorism and transnational organized crime
- Radicalism and violent ideology
- Food insecurity, drought, and desertification

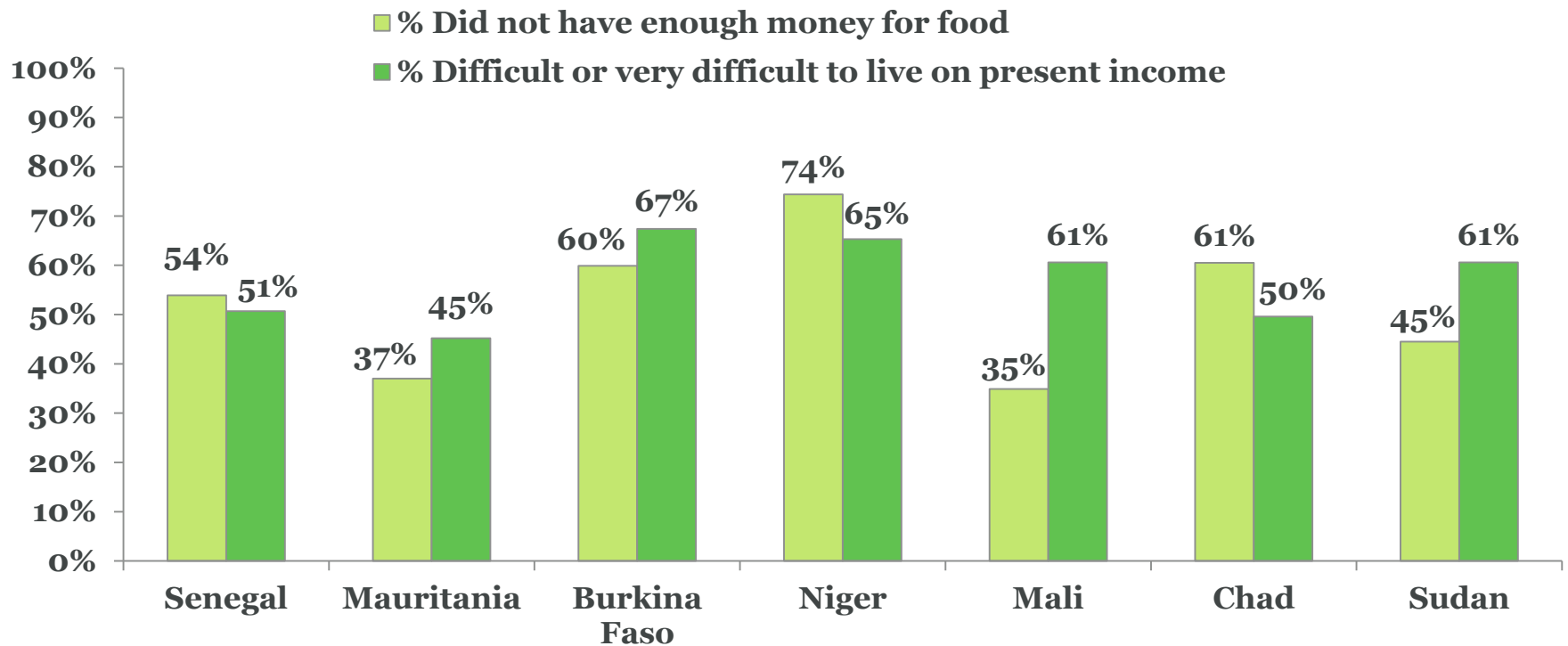
“We need to commit to the region through a holistic and unifying framework, capable of addressing humanitarian imperatives and long-term structural needs.”

— Secretary-General Ban Ki-moon

High Levels of Food Insecurity and Deprivation Across the Region

Have there been times in the past 12 months when you did not have enough money to buy food that you or your family needed? (% Yes)

Which one of these phrases comes closest to your own feelings about your household's income these days? Living comfortably on present income, Getting by on present income, Finding it difficult on present income, Finding it very difficult on present income.



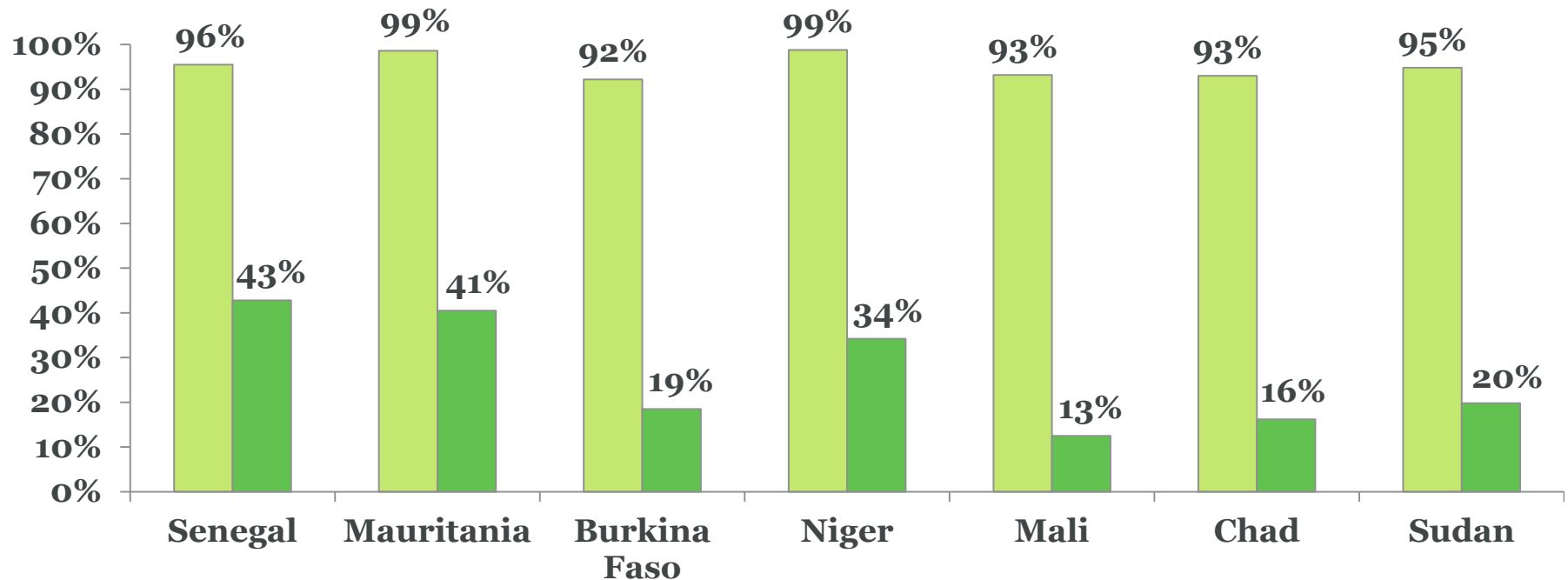
World Poll 2012, N=1,000 per country

Religion is Important in Daily Life, Low Support for Sharia as the Only Source of Legislation

Is religion an important part of your daily life? (%Yes)

In general, which of these statements comes closest to your own point of view? Shari'a must be the only source of legislation, Shari'a must be a source of legislation, but not the only source, Shari'a should not be a source of legislation.

■ % Religion is important in daily life ■ % Sharia as the only source of legislation



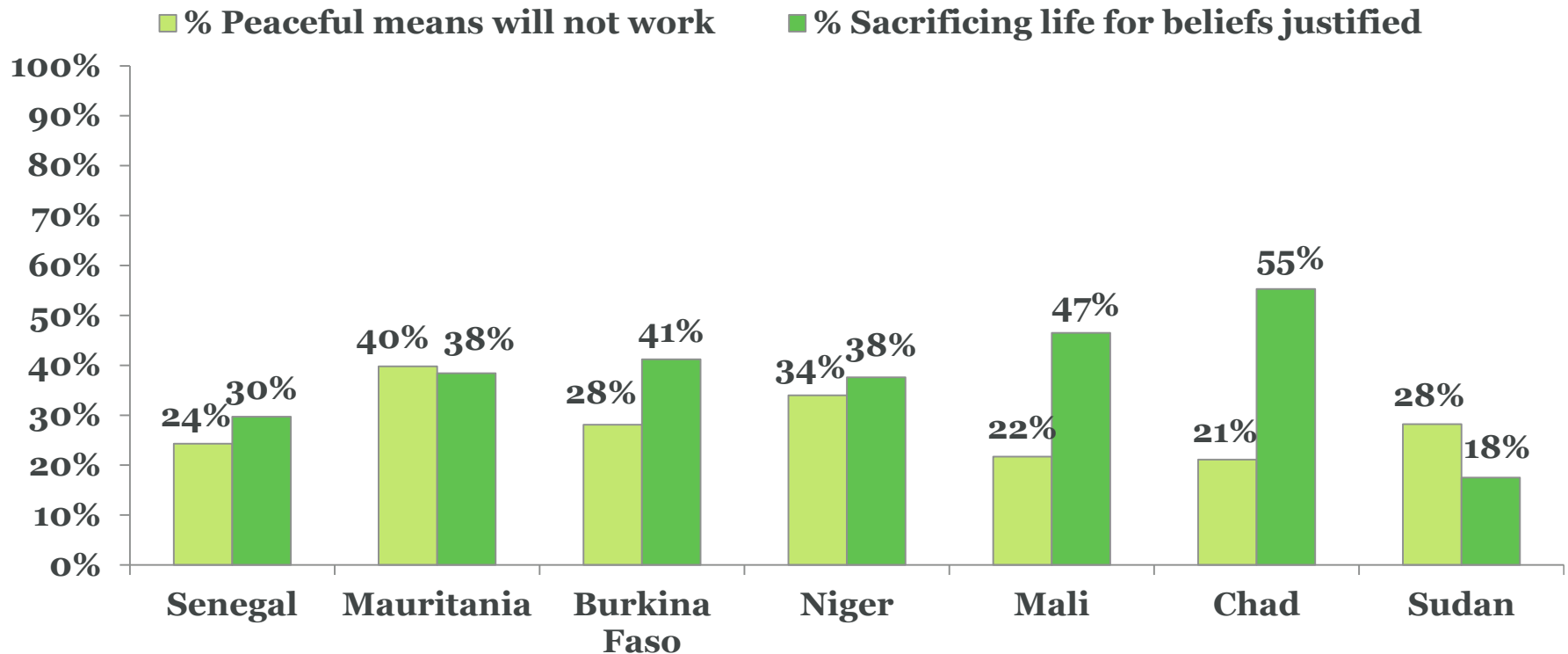
World Poll 2012, N=1,000 per country

Sharia data are latest available for each country.

Violent Ideology More Prevalent in Some Countries

Some people think that sacrificing one's life for what one believes in is morally justified, while others think it is never justified?

Can oppressed groups improve their situation through peaceful means alone, or can oppressed groups NOT improve their situation through peaceful means alone?

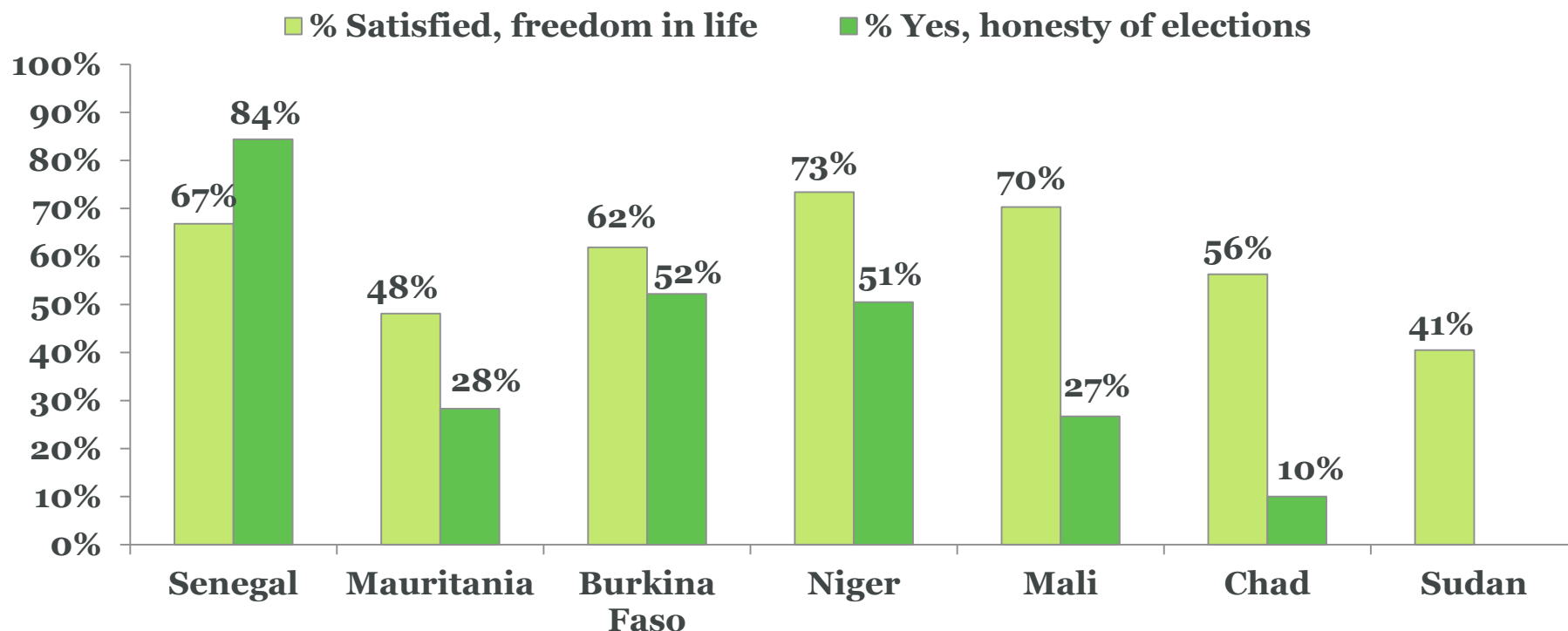


Data are latest available for each country.

Democratic Values Vary Across the Region

In this country, are you satisfied or dissatisfied with Your freedom to choose what you do with your life ? (%Satisfied)

In this country, do you have confidence in honesty of elections? (%Yes)

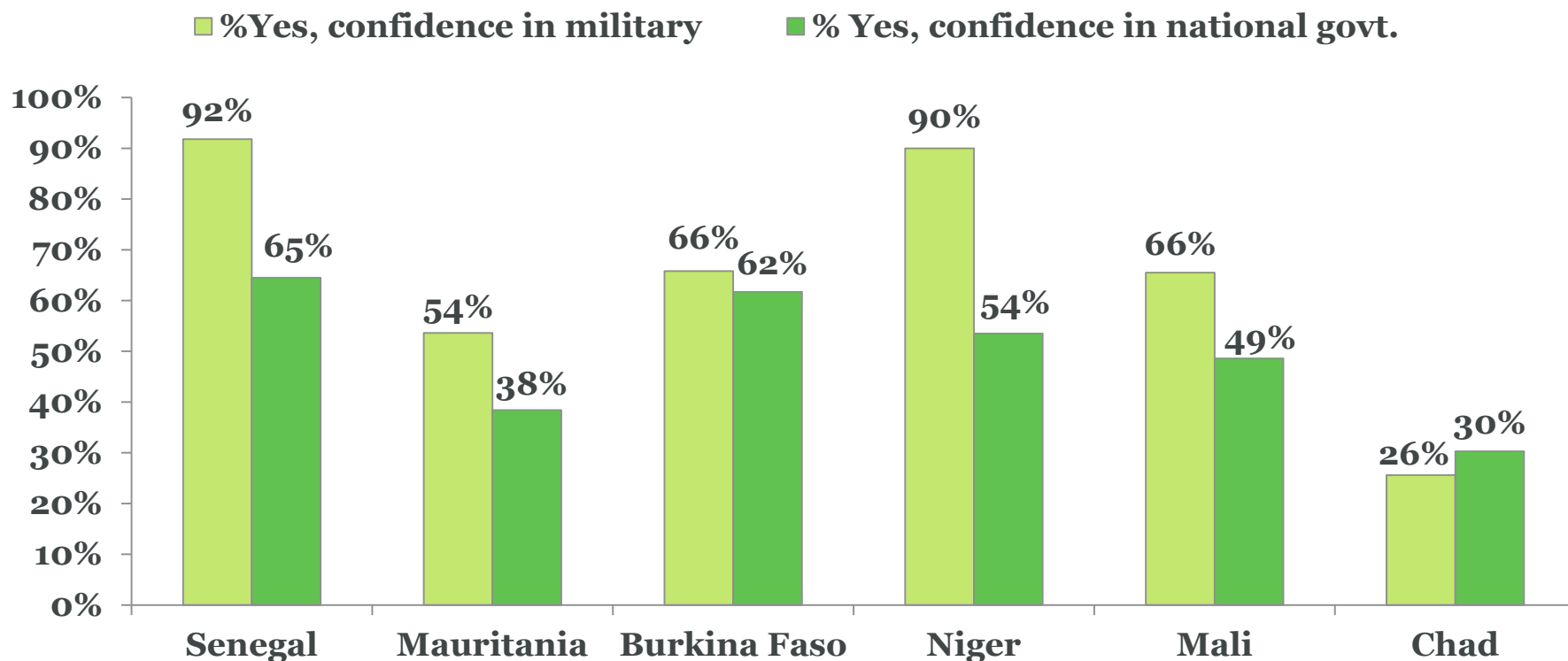


World Poll 2012, N=1,000 per country

Confidence in Institutions Varies Across the Region

In this country, do you have confidence in the Military? (%Yes)

In this country, do you have confidence in the national government? (%Yes)

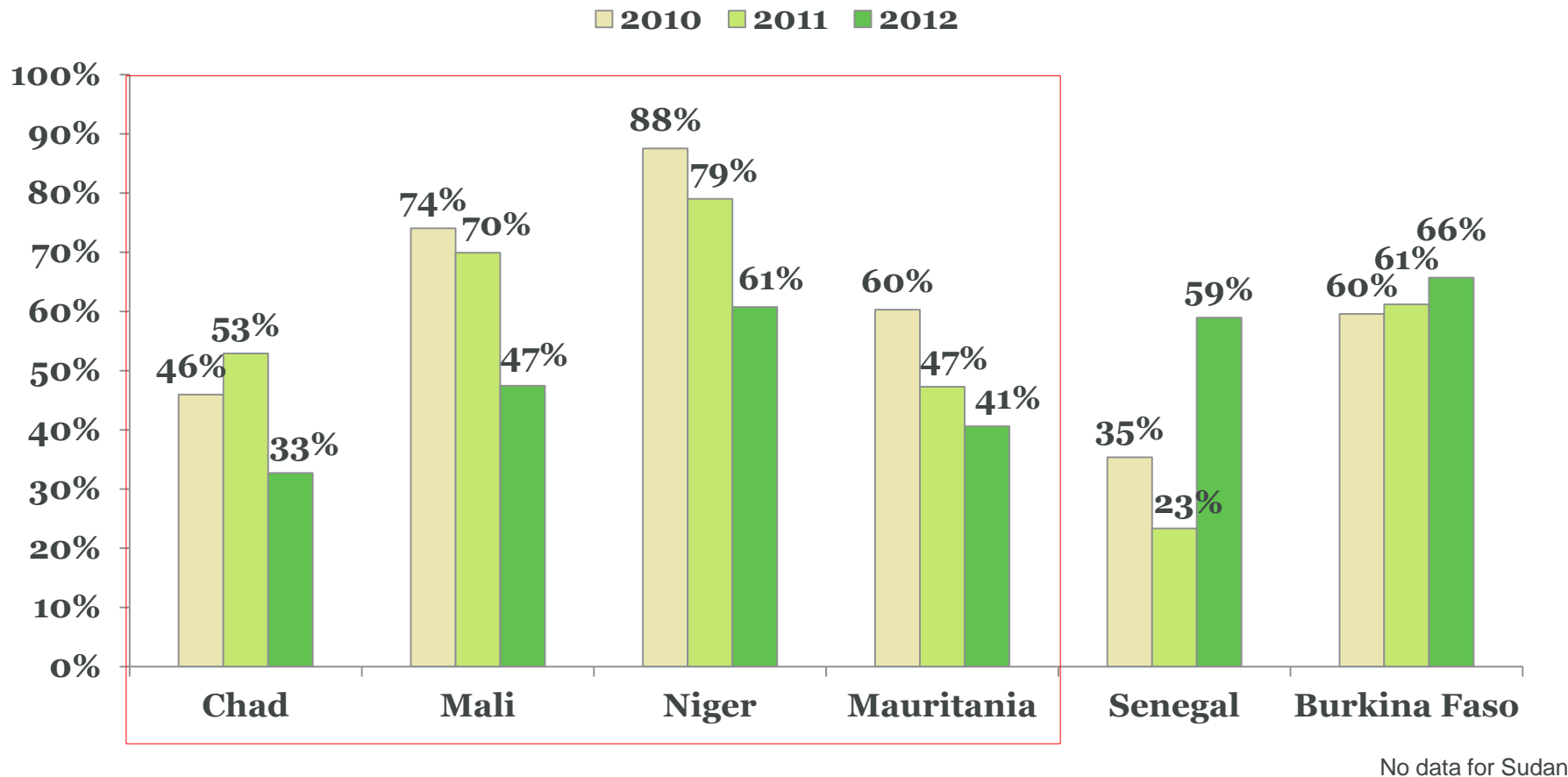


World Poll 2012, N=1,000 per country

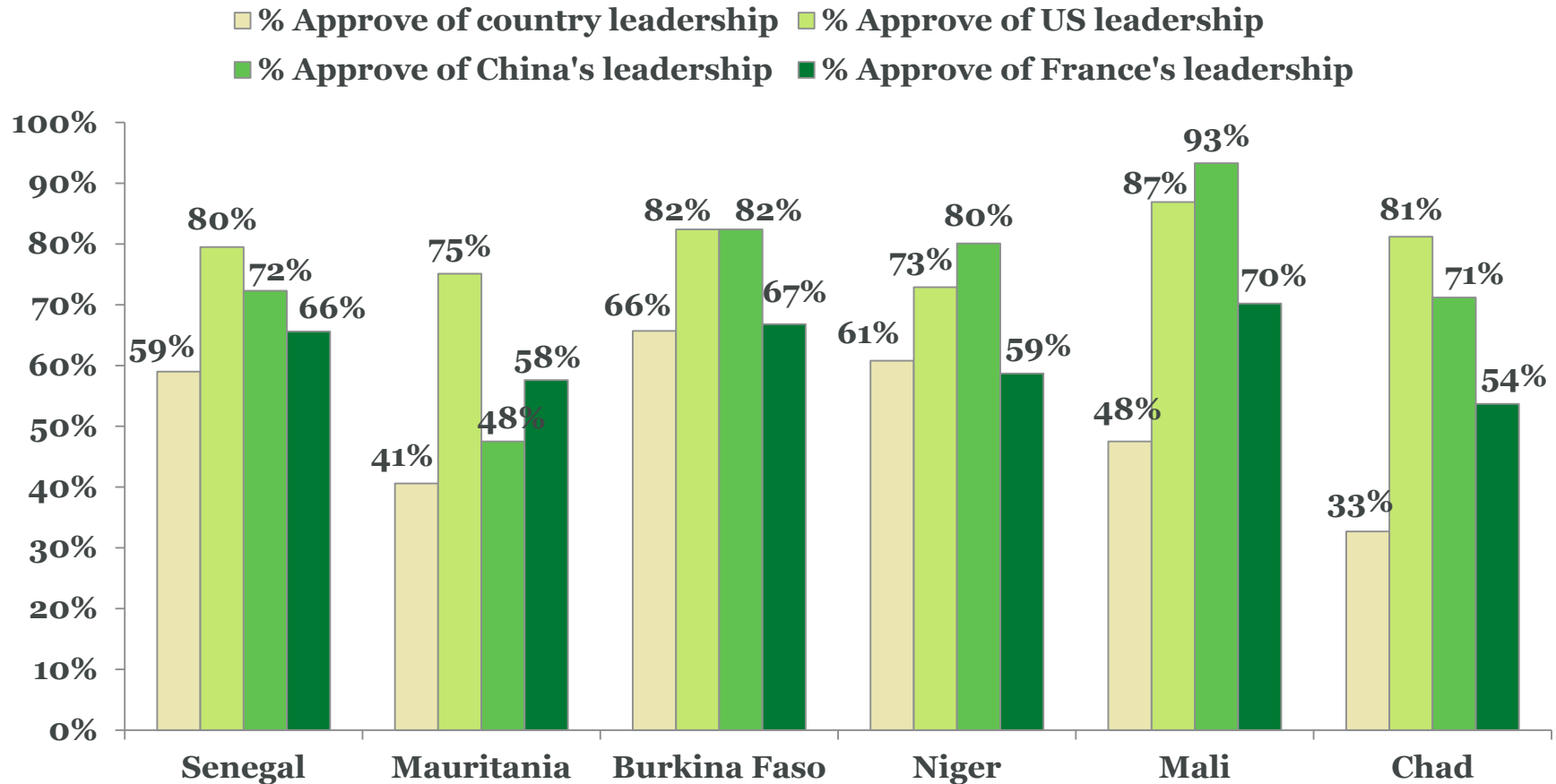
No data for Sudan

Approval of Country Leadership in Recent Years Has Seen a Sharp Decline Across Several Countries

Do you approve or disapprove of the job performance of the leadership of this country?



Approval of US Leadership Consistently High in the Region



World Poll 2012, N=1,000 per country

Conclusions

- Sahel is not a homogeneous region
 - High levels of food insecurity and poverty across the region
 - Religion is perceived important in everyday life however religious principles as a source of legislation find low support
 - High approval of US leadership across the region
 - Confidence in institutions varies across the region with military generally seen more favorably in most countries. At the same time approval of country leadership is declining in many
 - Wide variation in democratic values along with recent declines in perceived media freedom in some countries underscores the critical mission of International broadcasters
 - A task further complicated by the number of languages spoken

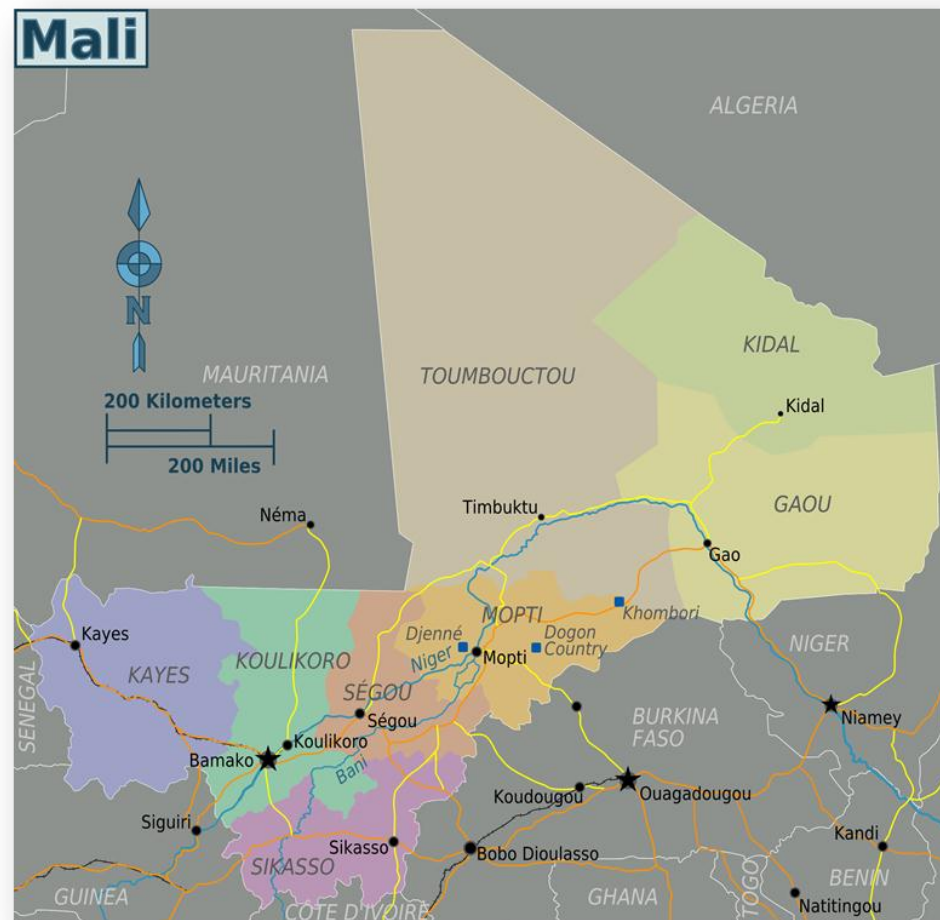


World Poll Mali Findings

National Context and Malians' Opinions Leading to the BBG Survey

Mali Surveys — Background and Conditions

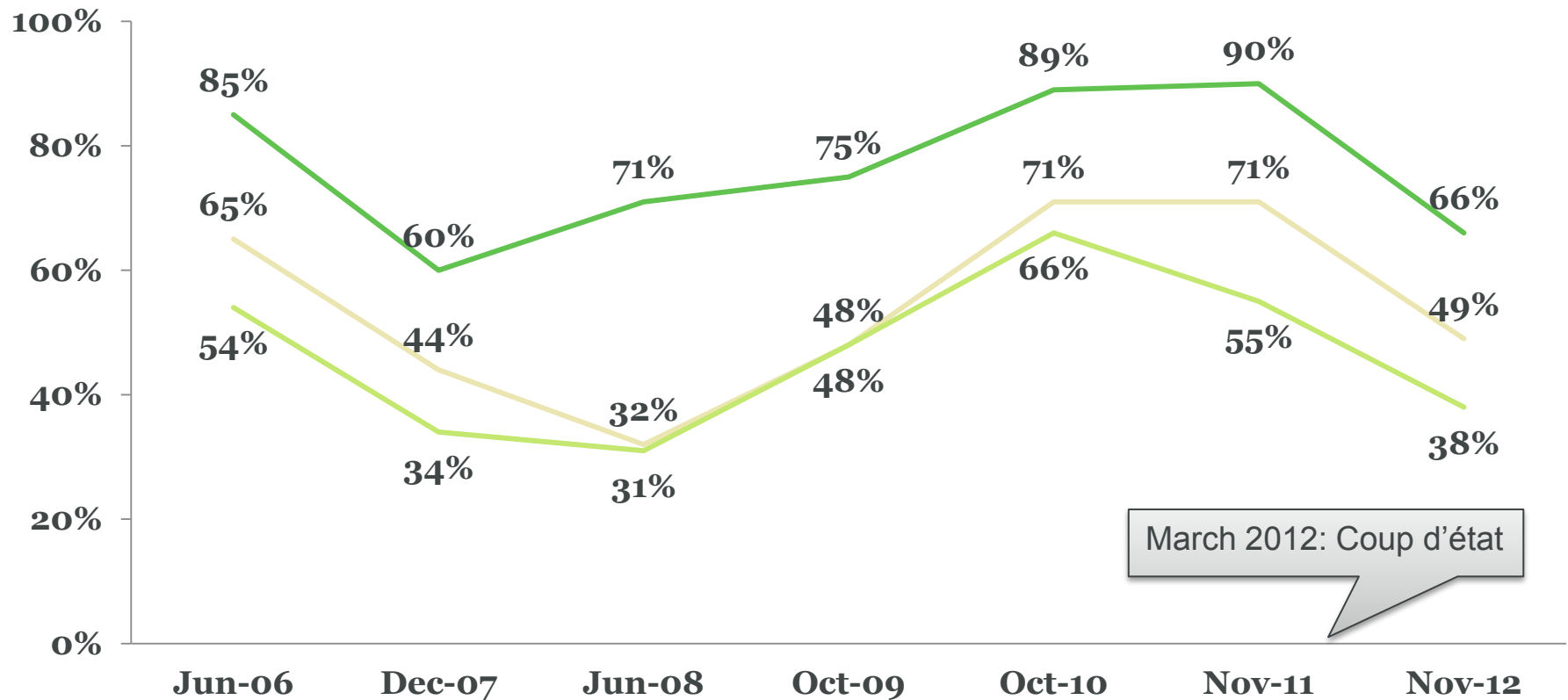
- Since 2006: 7 national surveys of individuals aged 15 and older
- Large country: about 500,000 square miles
- Geographic exclusions in 2012 (mainly in the North), representing about 25% of the total population
- Sample size: 1,000 per year
- Face-to-face mode:
PAPI: 2006-2010
CAPI: 2011-2012



Breakdown of Institutional Confidence

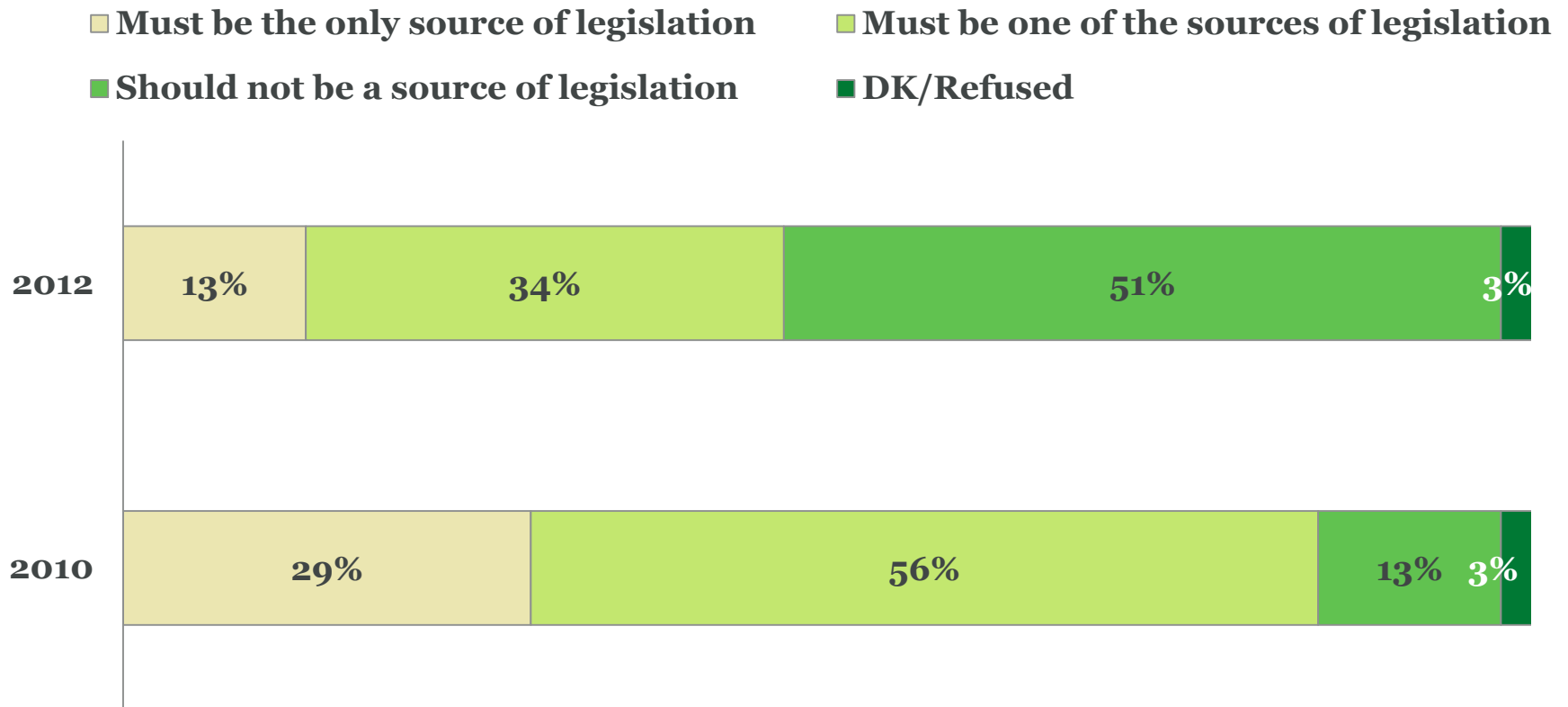
% Who say they have confidence

— National government — Judicial system — Military



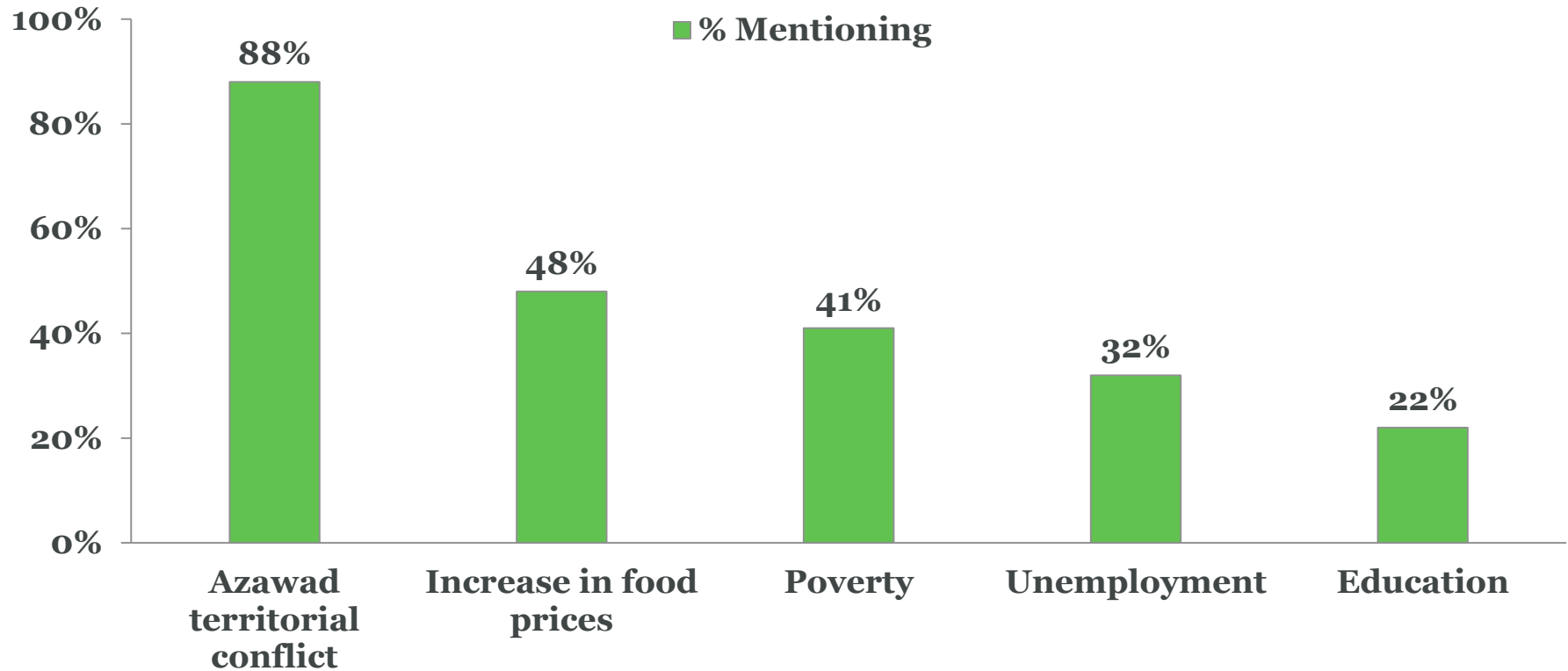
Malians Want Islamic Principles to Play a Lesser Role in Informing National Legislation

Shari'a is an Arabic word which means "Islam's religious principles." In general, which of these statements comes closest to your own point of view? Shari'a ...



Maliens Consider the Conflict in the Azawad Region to Be the Most Serious Issue the Country Faces

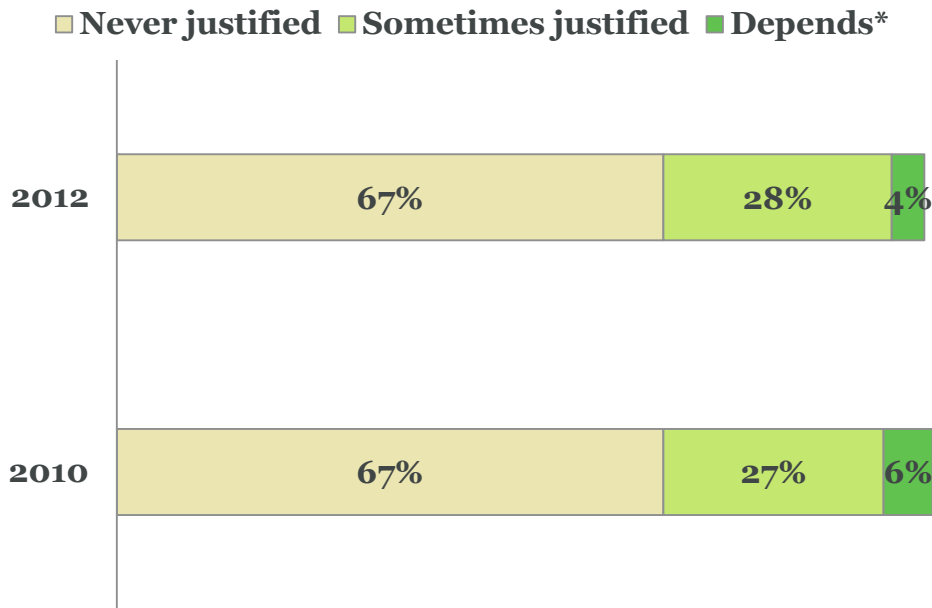
Many issues facing Mali are covered in the news media. Please tell me the three most serious problems facing Mali.



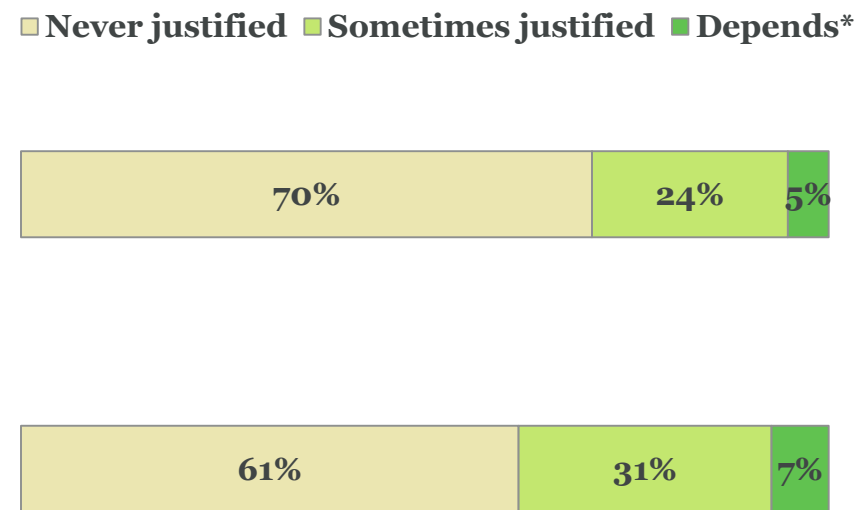
BBG Bamako 2012

Most Malians Reject Attacks on Civilians, Regardless of Who Initiates Them

Some people think that for **the military to target and kill civilians** is sometimes justified, while others think that kind of violence is never justified. Which is your opinion?



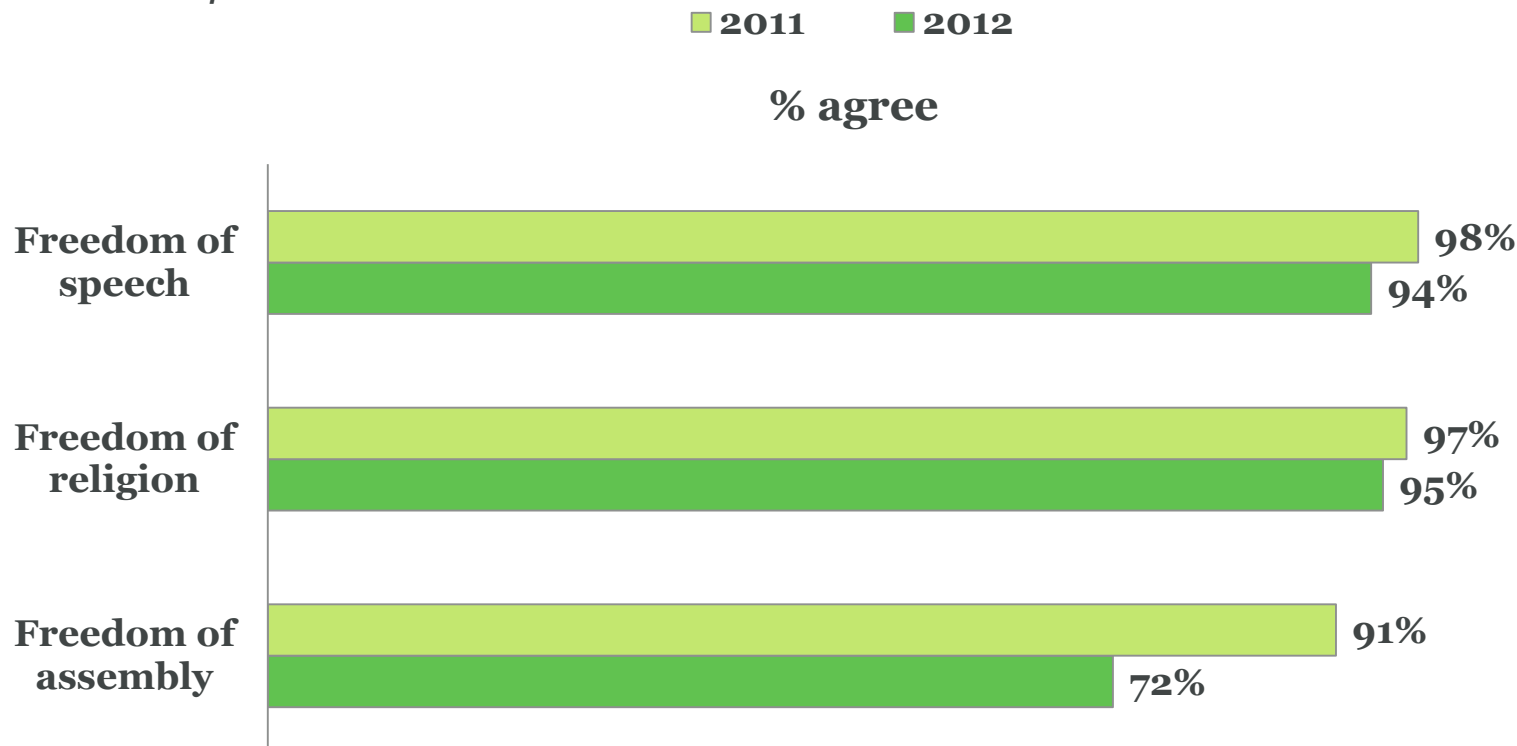
Some people think that for **an individual or a small group** to target and kill civilians is sometimes justified, while others think that kind of violence is never justified. Which is your opinion?



* Volunteered response

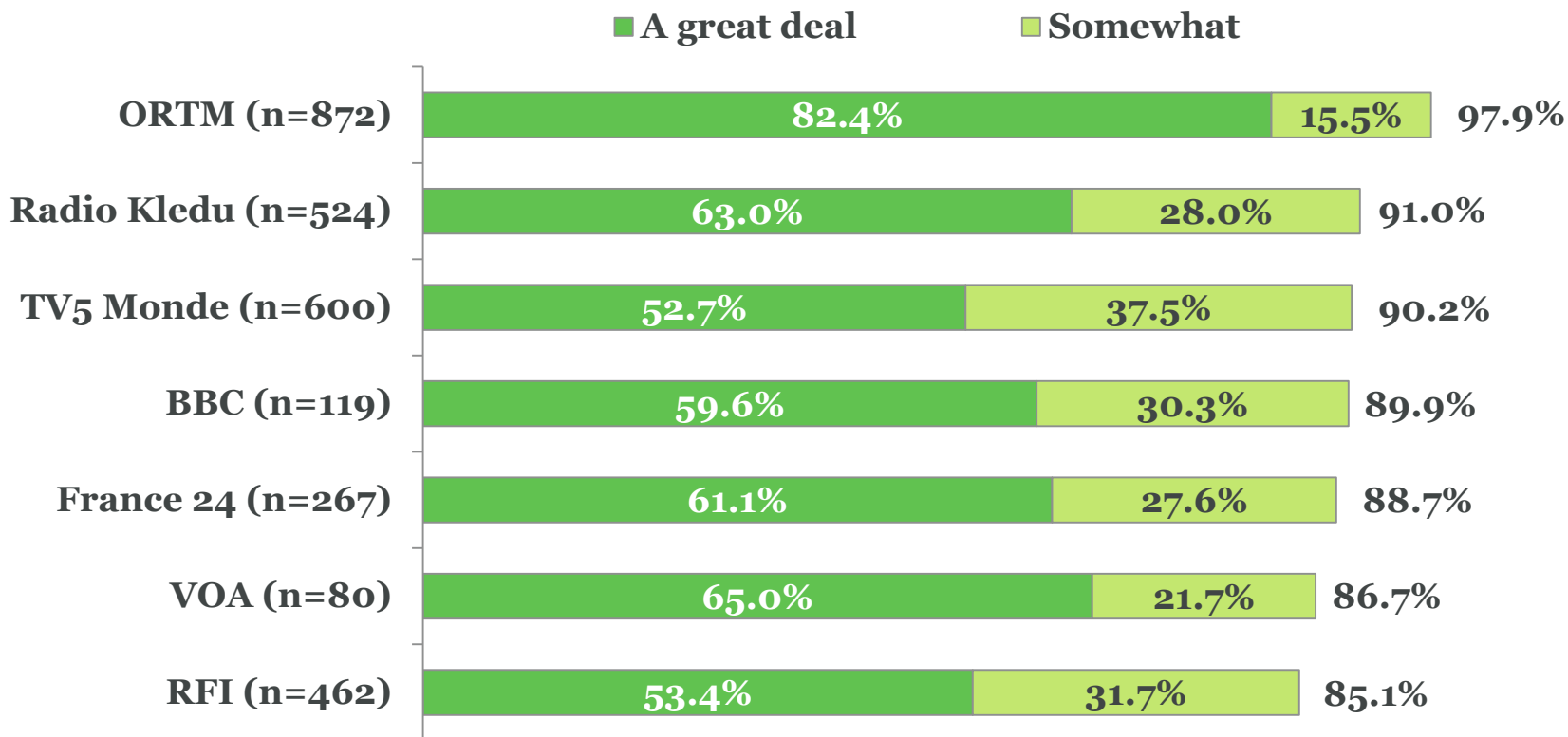
Strong Support for Basic Democratic Freedoms

Suppose that someday you were asked to help draft a new constitution for a new country. As I read you a list of possible provisions that might be included in a new constitution, would you tell me whether you would probably agree or not agree with the inclusion of each of these provisions?



High Trust Ratings for ORTM, Radio Kledu, and VOA

How much do you trust the news you get from each of the following sources, whether it is from their TV broadcasts, radio programming, or their online content — a great deal, somewhat, only a little or not at all? — among past-week users of each broadcaster who offer an opinion



BBG Bamako 2012

Broadcasting Opportunities

- Fast-changing socio-political environment that creates a deep need for Malians to have objective and trustworthy news about their country and the greater region
- Importance of covering a variety of topics based on Malians' preoccupations and interests
- Importance of maintaining Bambara programming due to its widespread understanding throughout the country, but to better reach rural populations, other languages are needed
- High approval of US leadership and high trust ratings for national broadcaster strengthen VOA's new 24/7 station's position in the capital city

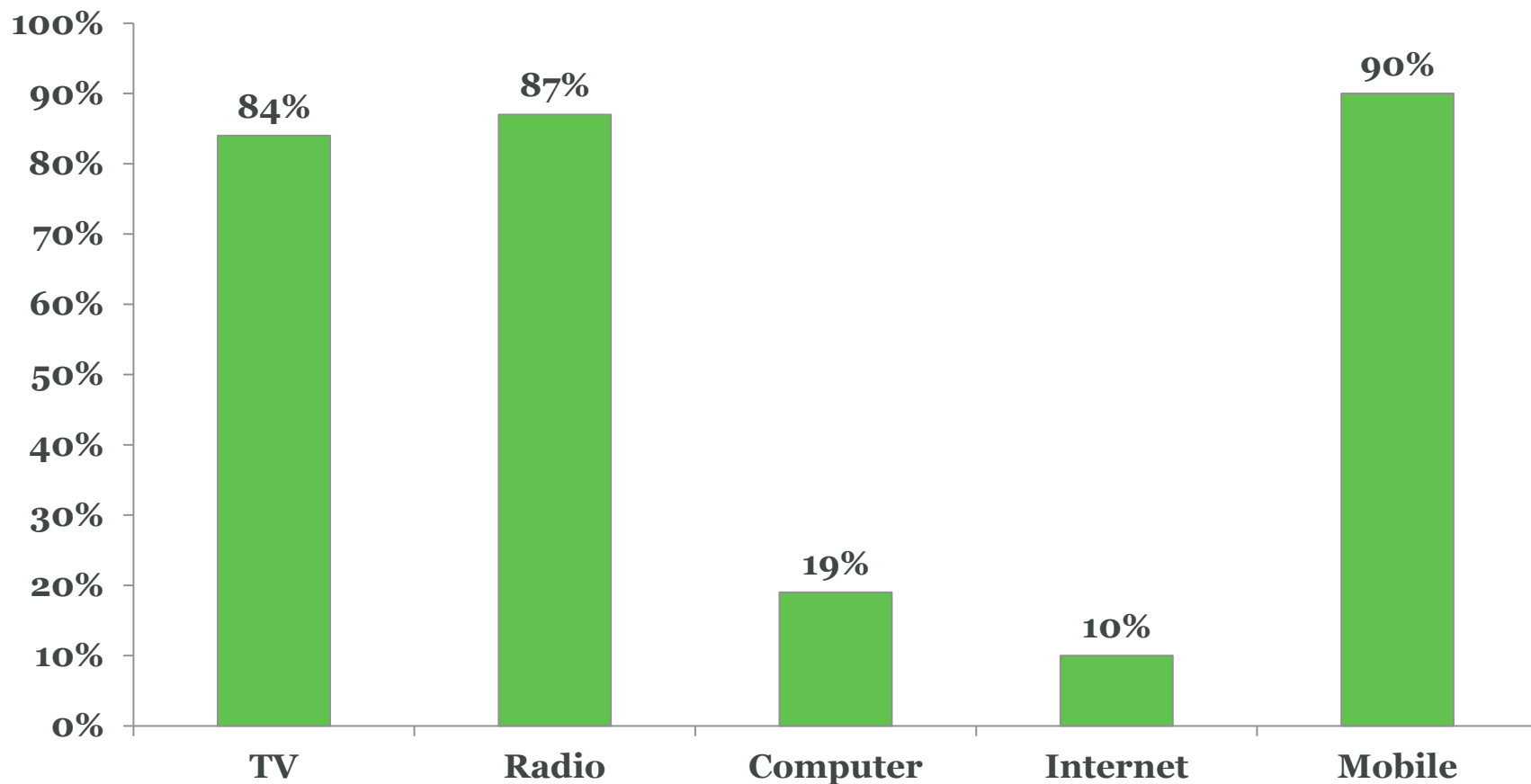
Mali and Somalia

Media Environments

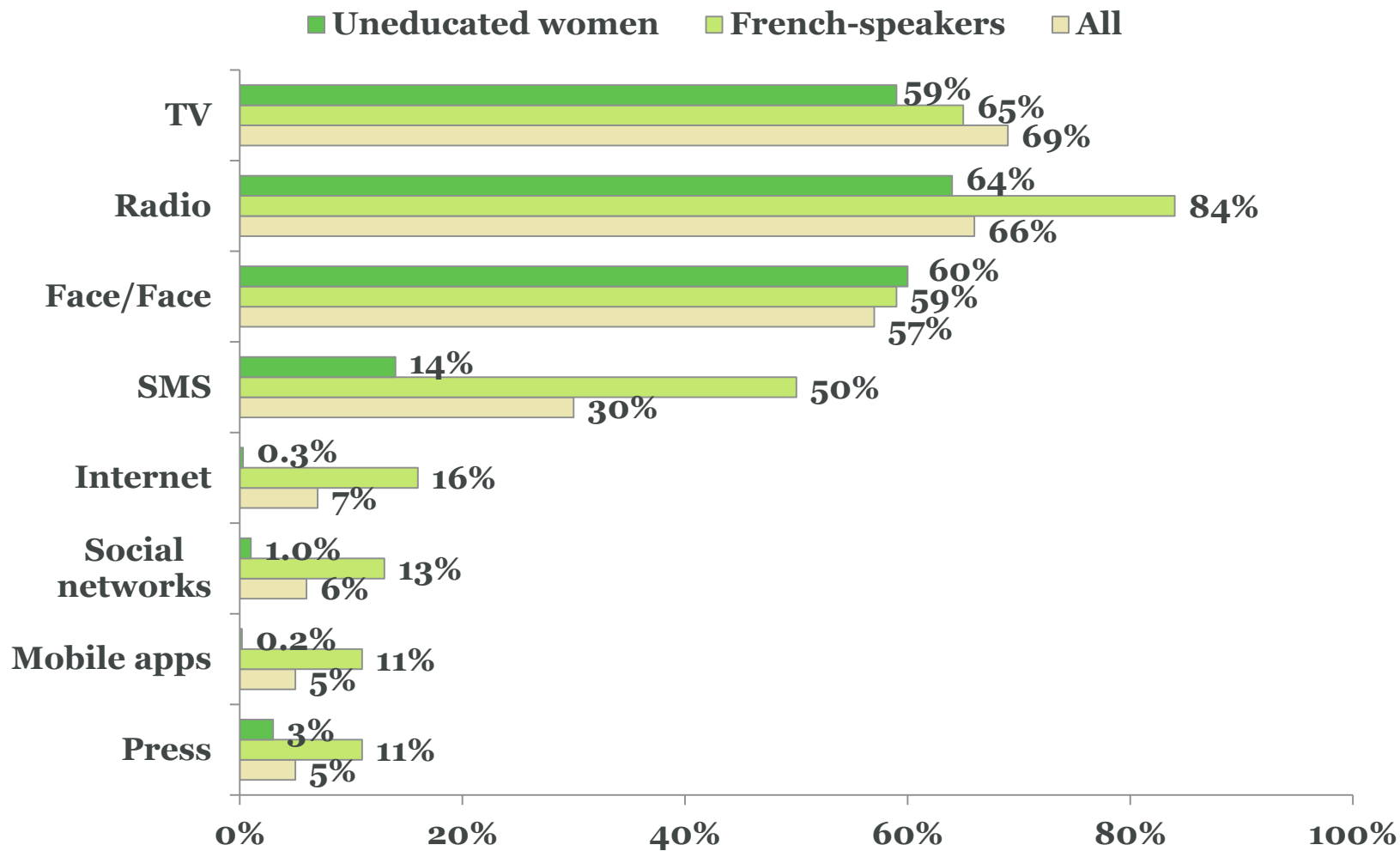
Bamako, Mali

- Caution: Bamako is not Mali!
- Access to broadcast platforms is close to ubiquitous; also mobiles
- Access to new media low by the standards of most other African capitals
- Media consumption patterns heavily driven by language ability
- Sharp distinctions in media platform use by demographics, even in the capital

Household Access to Media Platforms



Media Platforms: Daily Use for News

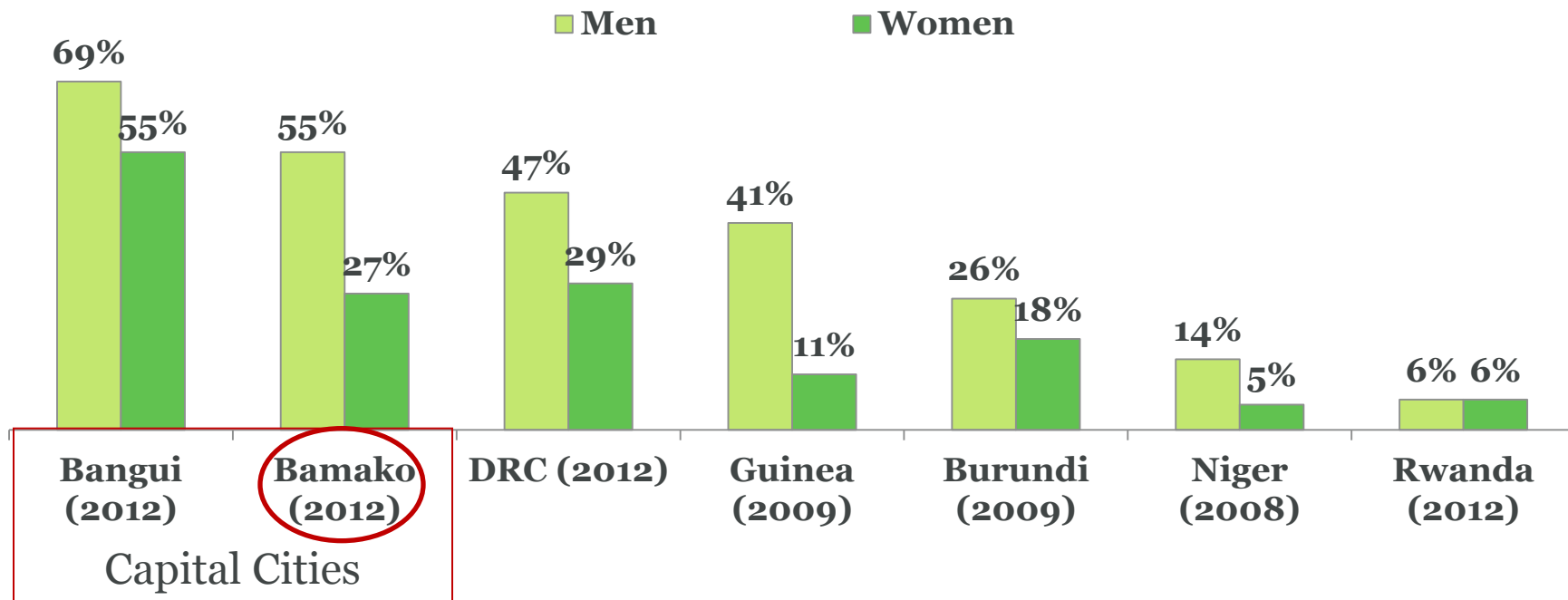


The Language Issue

- Most people in “Francophone” Africa don’t speak French
- Notable differences in media use between French speakers (who tend to be well-educated and well-off) and non-French speakers
- French speakers have a more varied media diet and access to a greater variety of media platforms, particularly computers and the Internet
- Reaching rural, marginalized populations requires local languages

Male-Female French Skills Gap

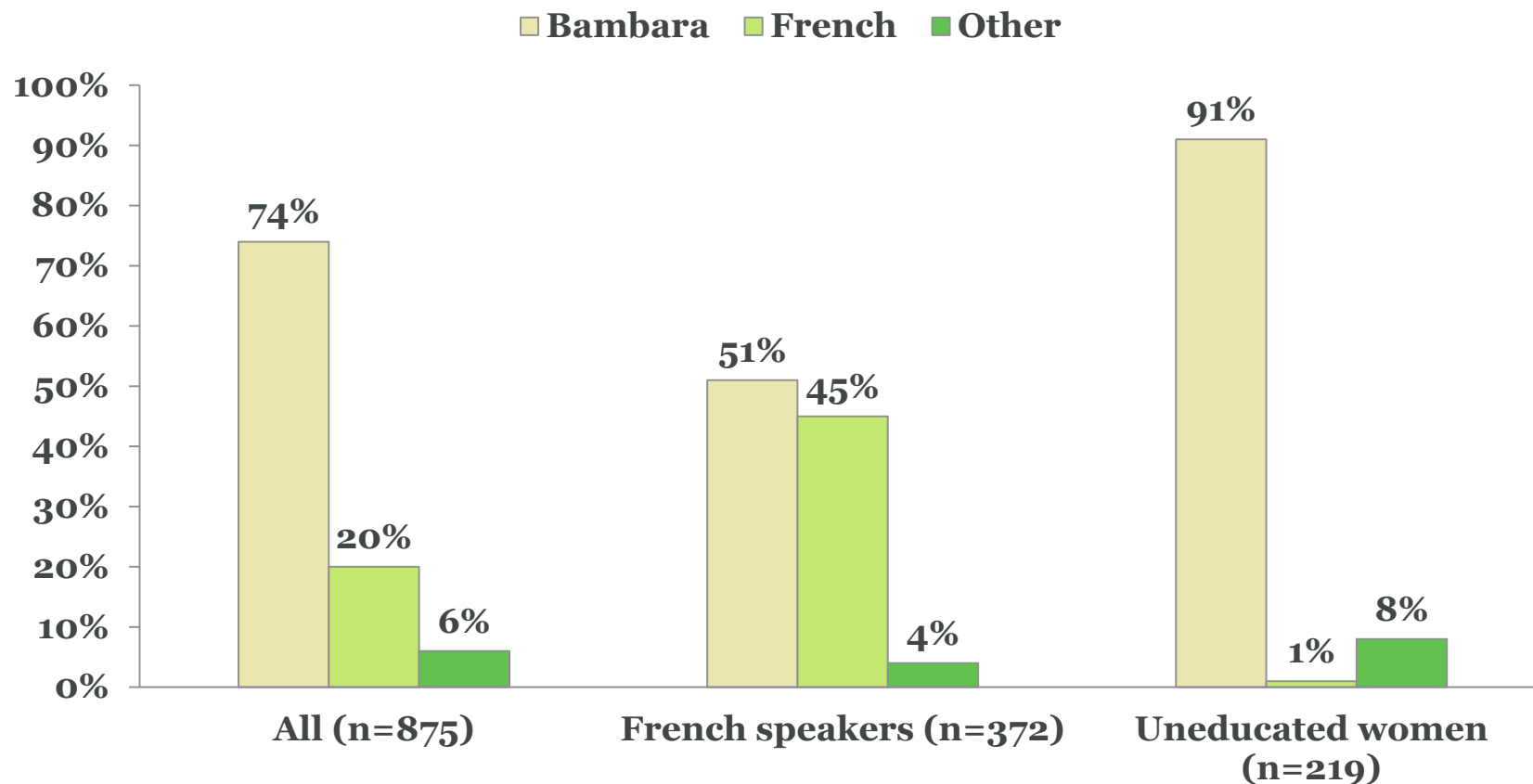
Understand All or Most of a French Broadcast



In the surveyed countries, women tend to have lower education levels than men, and are hence much less likely to speak French.

- This leaves the potential audience of French-language broadcasters heavily male dominated

Radio Language Preferences Among Radio Listeners

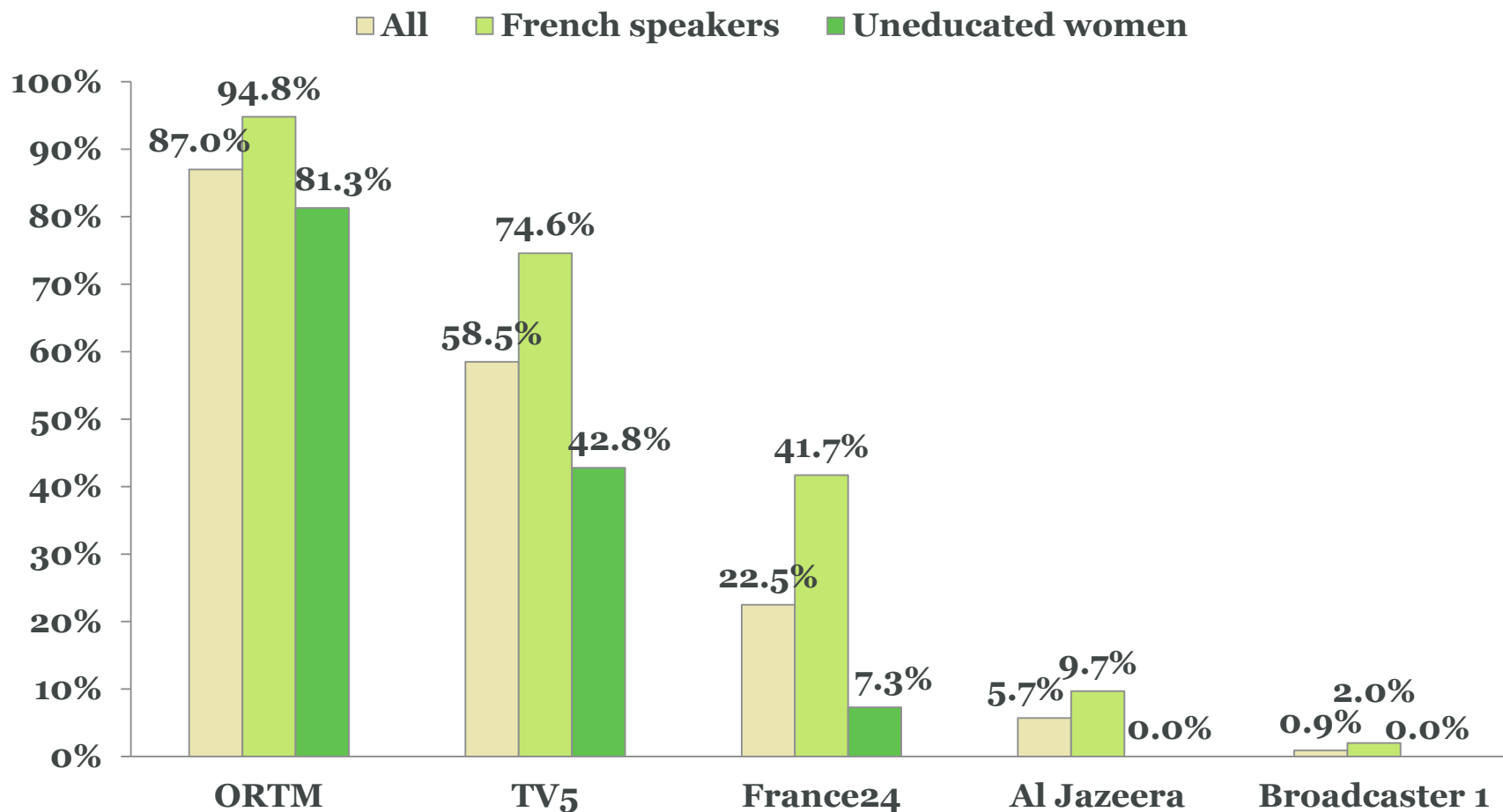


Percentage of radio users in each group preferring Bambara, French, and other language for radio listening

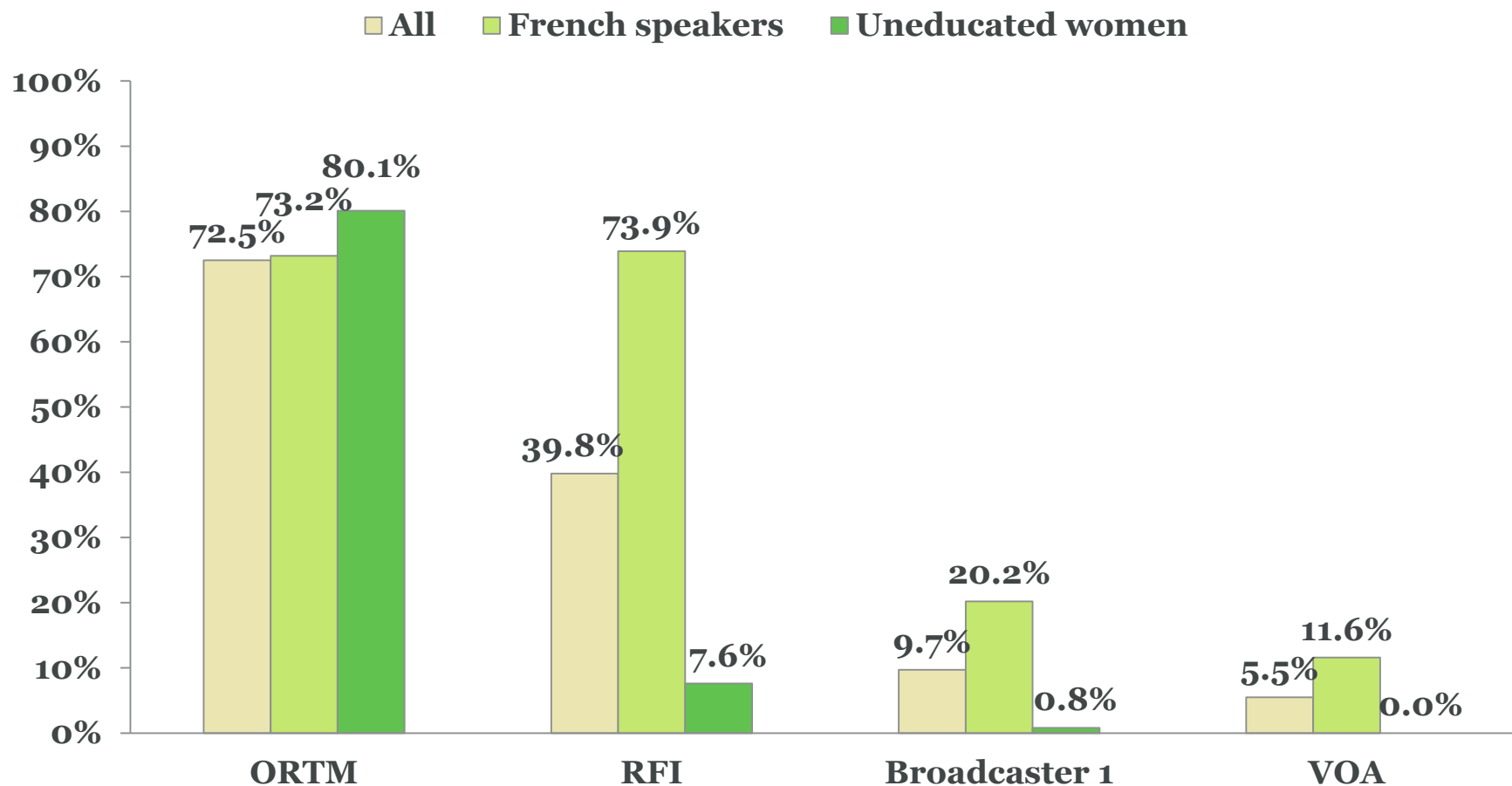
Usage of External Media

- As elsewhere in Francophone Africa, the French radio and TV broadcasters (RFI, TV5, France 24) dominate external broadcasting
- Audience for French-language broadcasts limited by language capacity
- Especially difficult to reach women (who tend to have lower education levels than men) with French-language programming

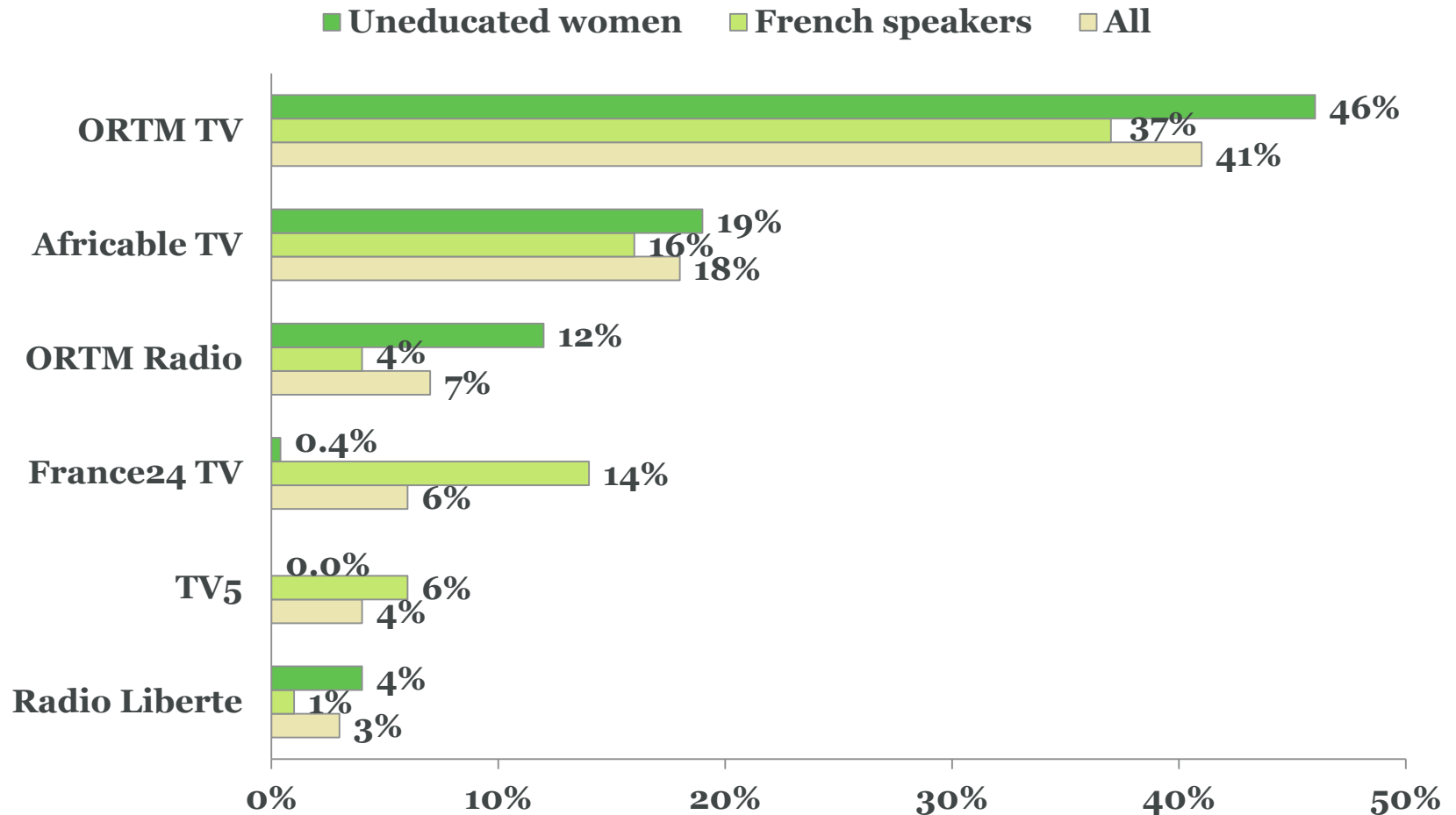
Past-Week TV Audiences of Select Channels



Past-Week Radio Audiences



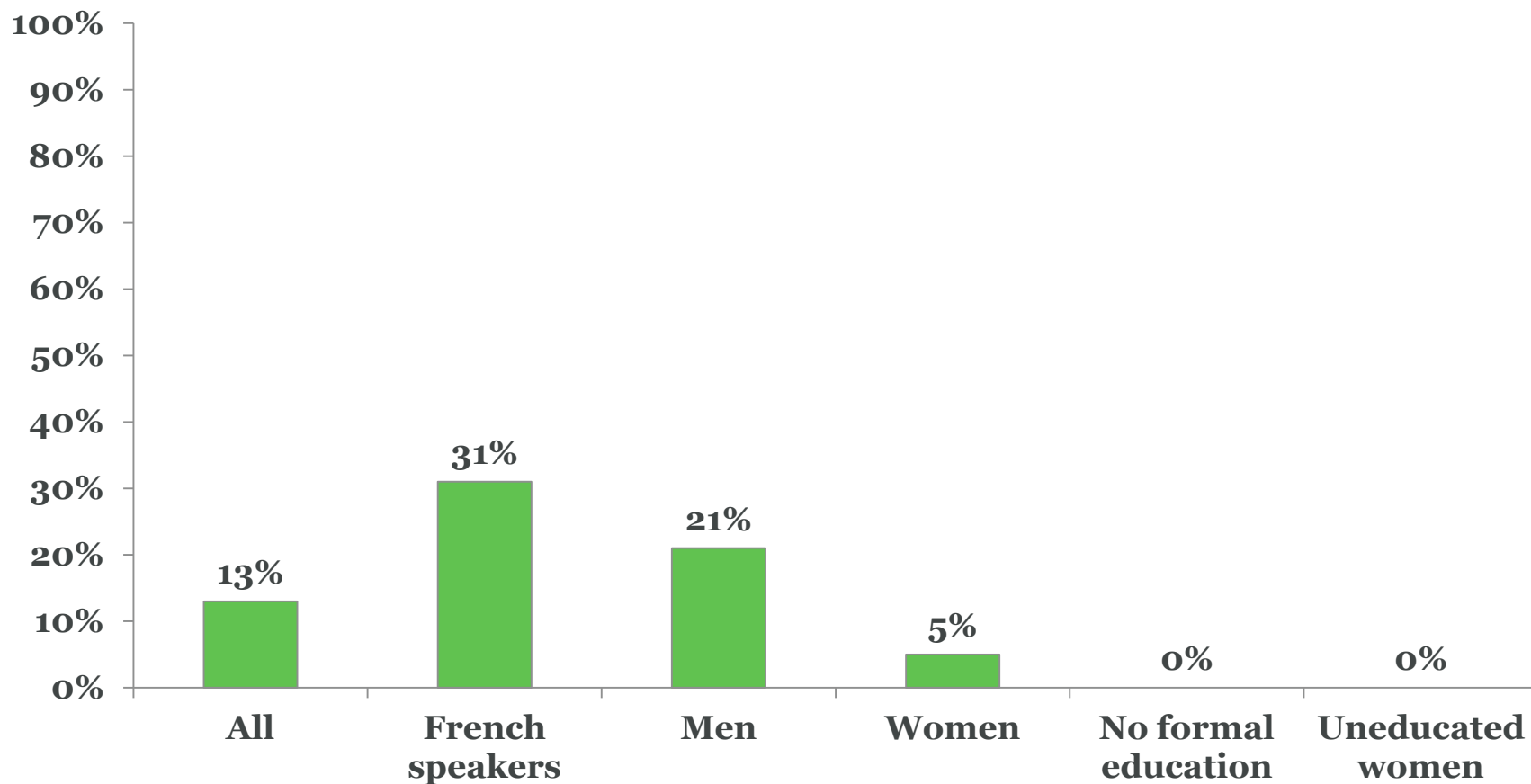
Most Important News Source



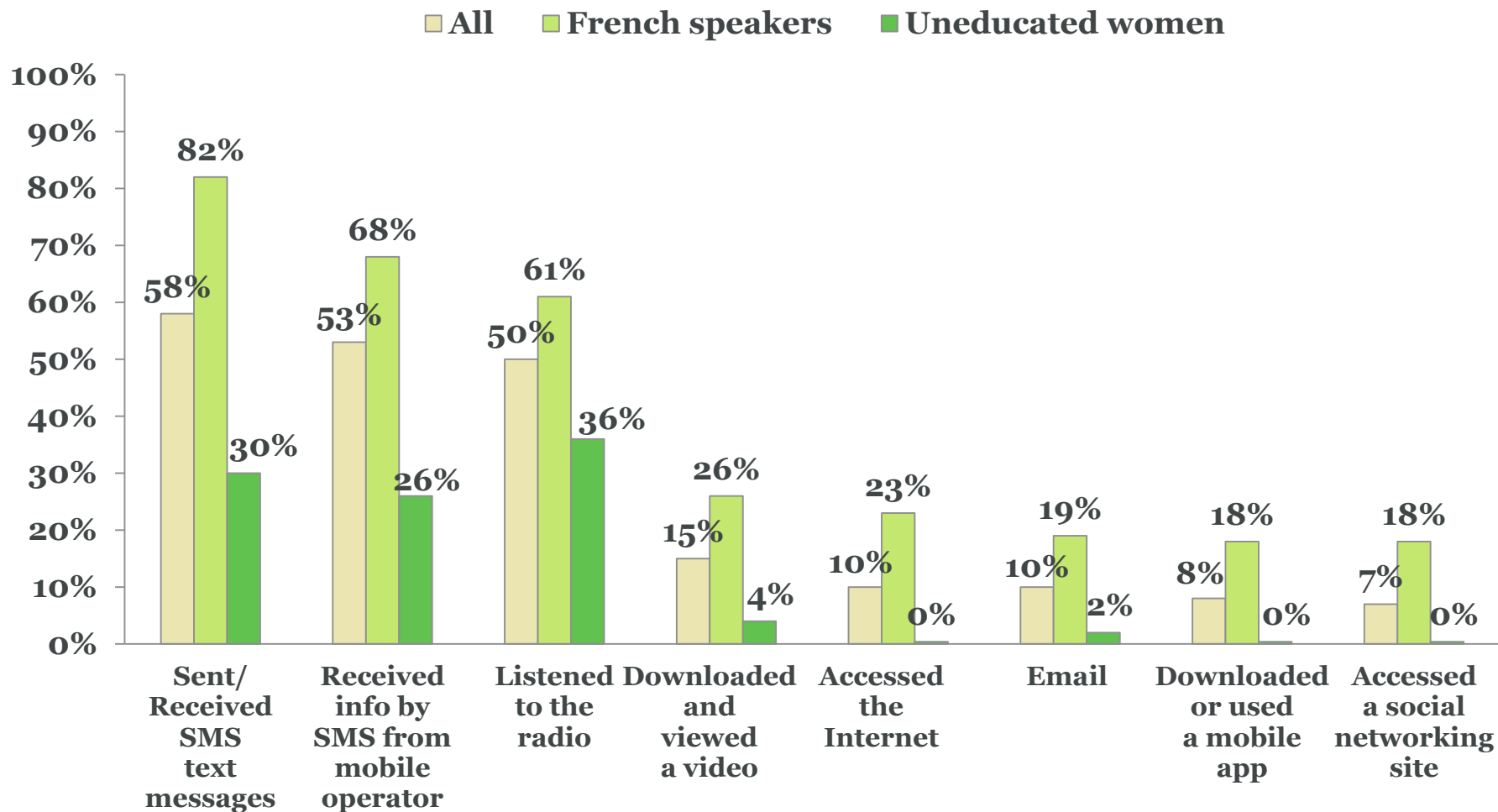
Aspects of New Media Use

- Lack of literacy and language skills prevents many from fully participating in new media; hence, massive gender imbalance
- Facebook and search engines are main news sources on the Web
- Internet access via mobiles growing but less extensive than in some other markets

Weekly Internet Use



Mobile Phone Activities



Additional Research

- BBG has attempted to track impact of rapid changes in local environment and our own broadcasting strategy with quick turn-around studies
- BBG/Gallup survey of Bamako was undertaken in December 2012, just prior to introduction of our 24/7 FM
- Bambara language added in March, 2013
- “Micro-poll” run in May, 2013 (120 respondents over 4 weeks) to assess initial reaction to new program (not intended for audience measurement)
- Mobile SMS-based poll (n=602) run in September, 2013

Findings from Additional Research

- “Micro-poll” (May, 2013)
 - Virtually all listeners tuning in on FM – majority via the 24/7 FM frequency but about half also on VOA affiliate Radio Kledu
 - Almost no audience via SW, mobile, web
 - Very positive reaction to Bambara, as well as heavy focus on Mali news
 - Also good reaction to focus on social issues, women, culture
 - “Hearing Bambara from the USA makes me proud”
 - “We learn a lot from the program; it give us courage”
 - Interest in longer programs, more news about Northern Mali

Mobile Survey Findings

- Mobile IVR survey, September, 2013
 - 602 respondents, theoretically national
 - About one quarter were VOA listeners
 - About equally divided between French and Bambara
 - 50-60% were listening FM; about evenly divided between 24/7 and affiliate
 - Less than a quarter listened on SW; roughly a fifth cited the Internet (which definitely requires further investigation)

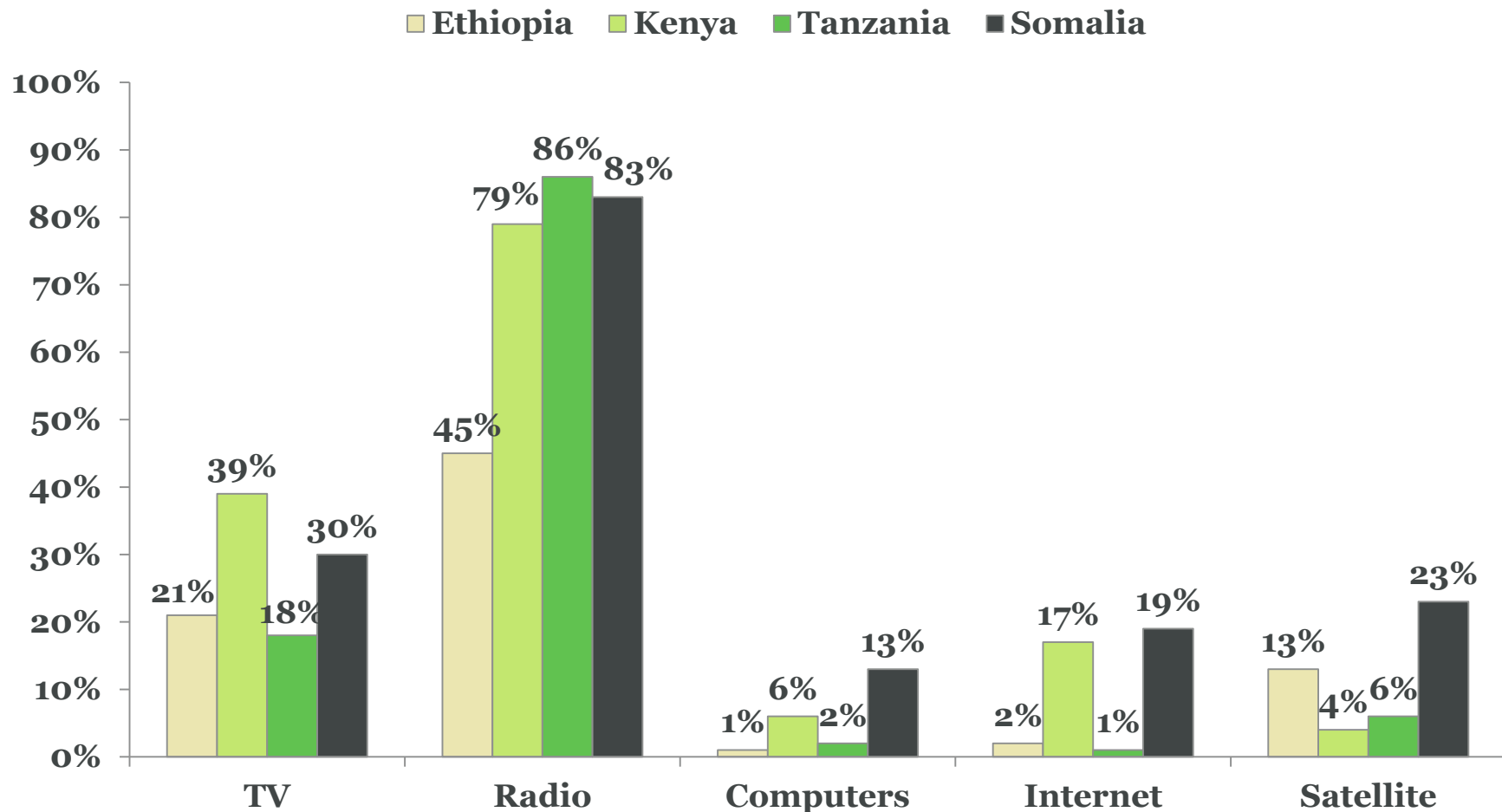
Strategic Considerations for a Mali Communications Strategy

- Don't forget the importance of local language to reach broad cross-section of the population
- Broadcast media remain paramount; on a national radio is likely to be the key medium
- Digital is still mostly a niche phenomenon

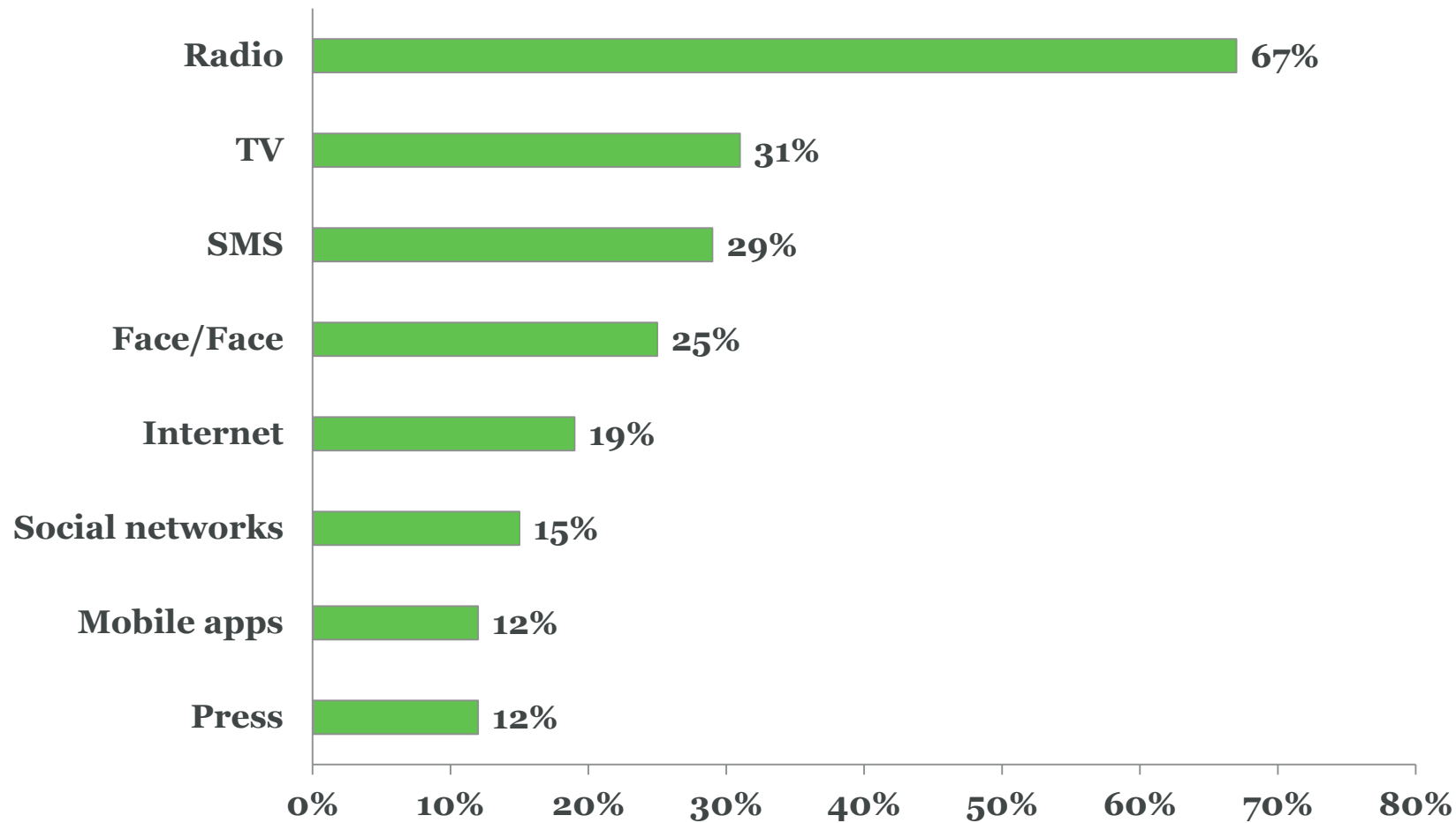
Somalia

- An “unexpectedly” sophisticated media environment
- Relatively high levels of media use and access to satellite TV, mobiles, and Internet
- Why?
 - Role of Somali diaspora
 - Lack of government constraints, regulation

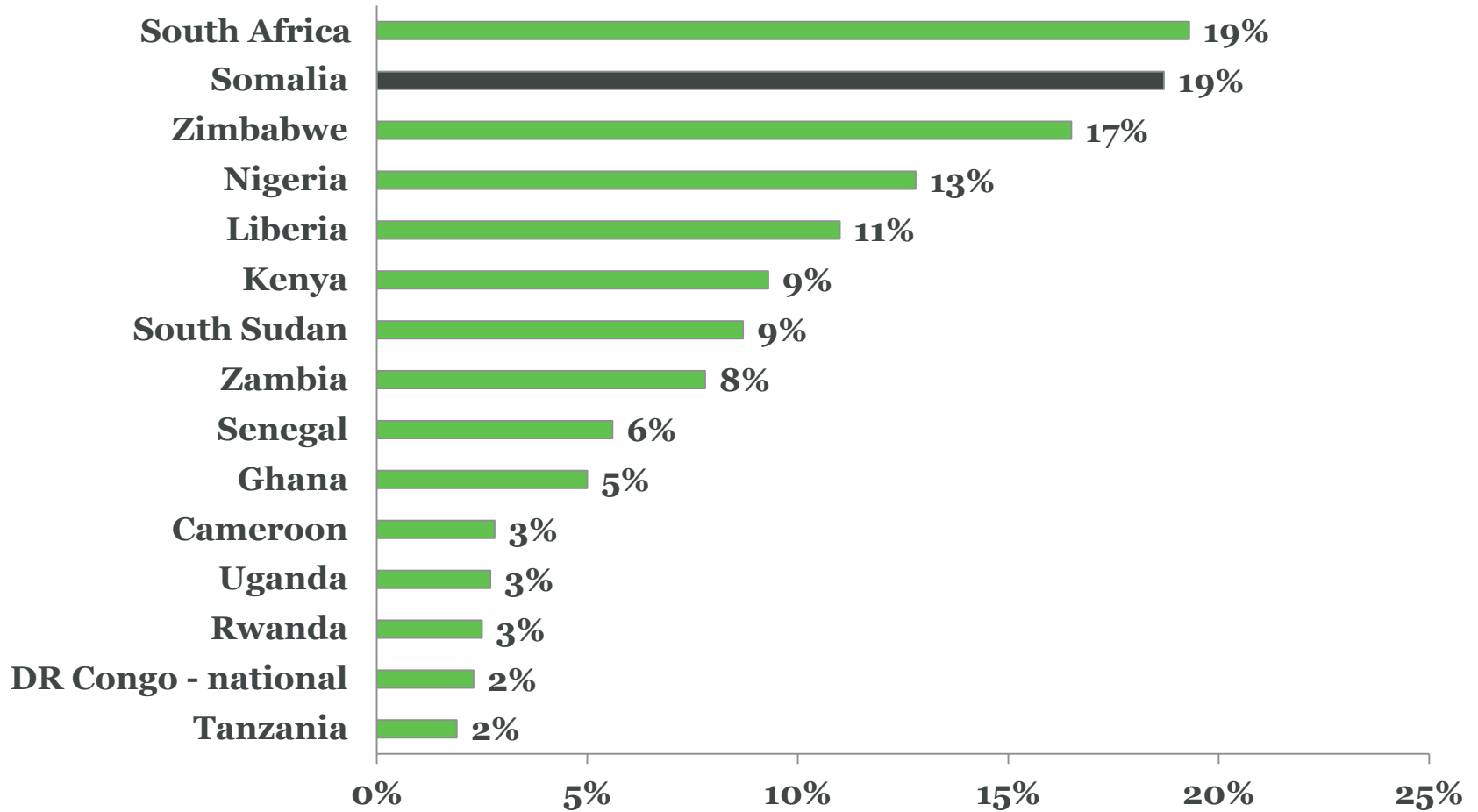
Household Access to Media Platforms



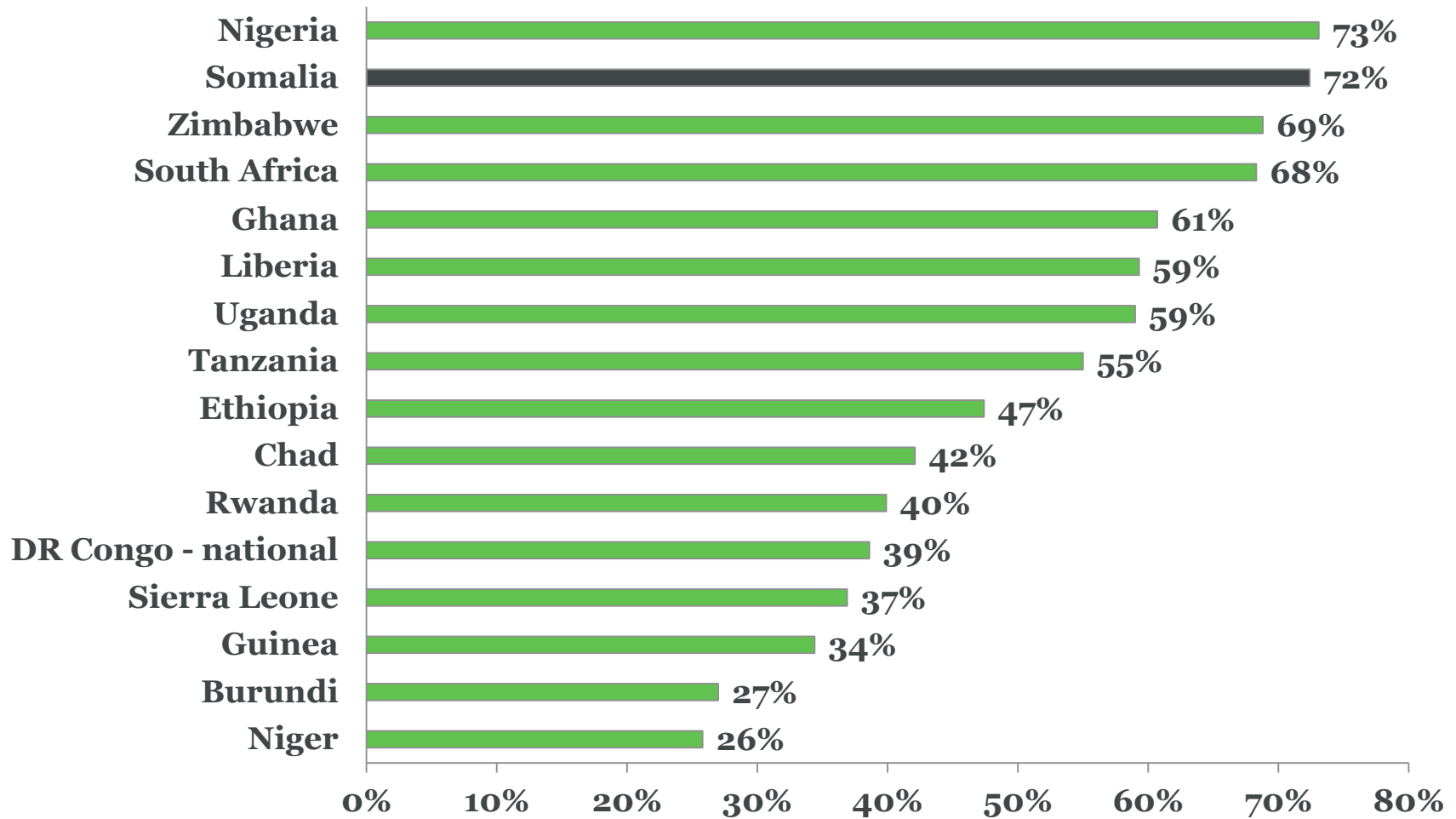
Media Platforms: Daily Use for News



Daily Use of Internet for News: Somalia vs. Other African Countries



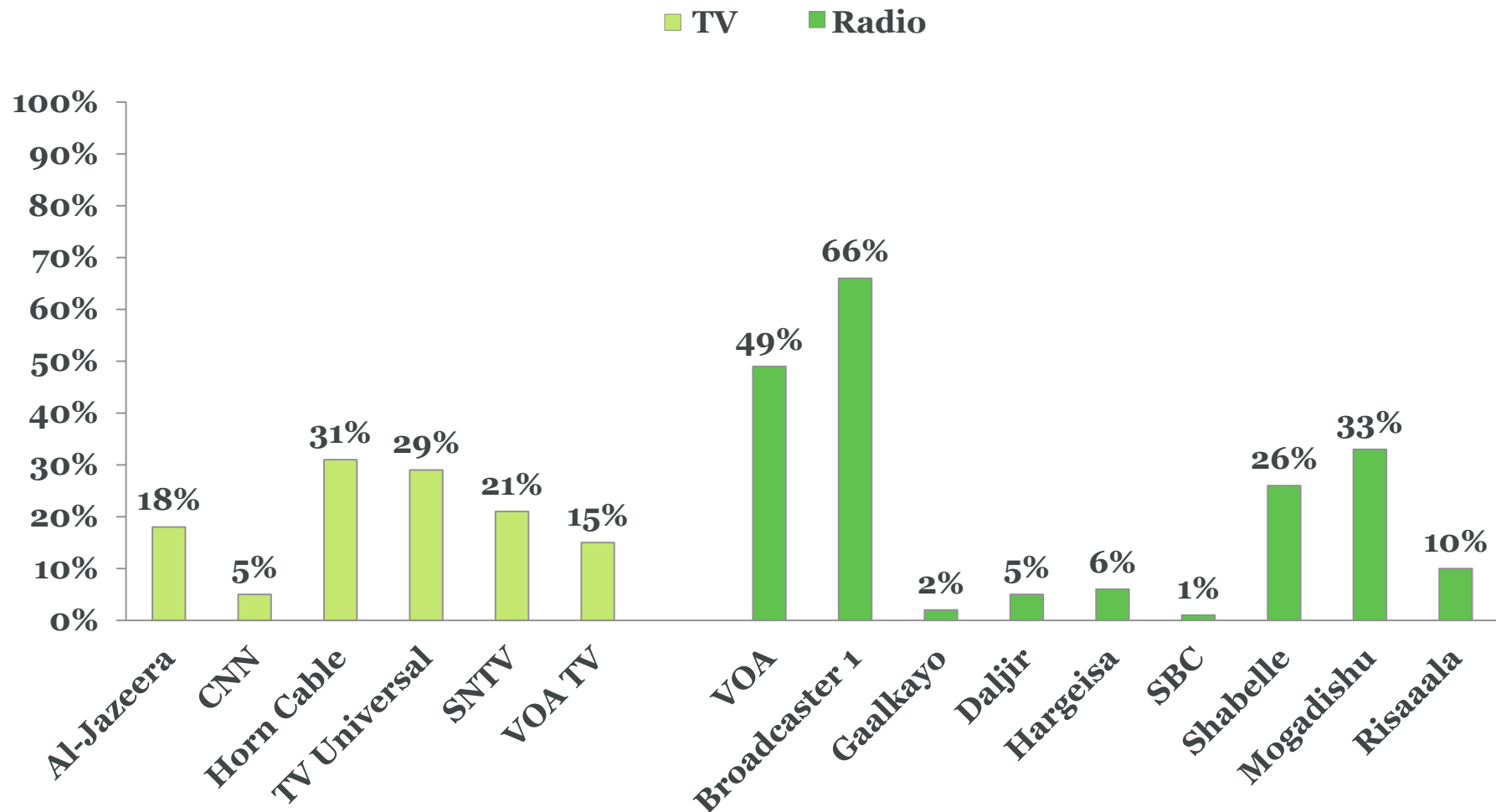
Personal Ownership of Mobile Phone: Somalia vs. Other African Countries



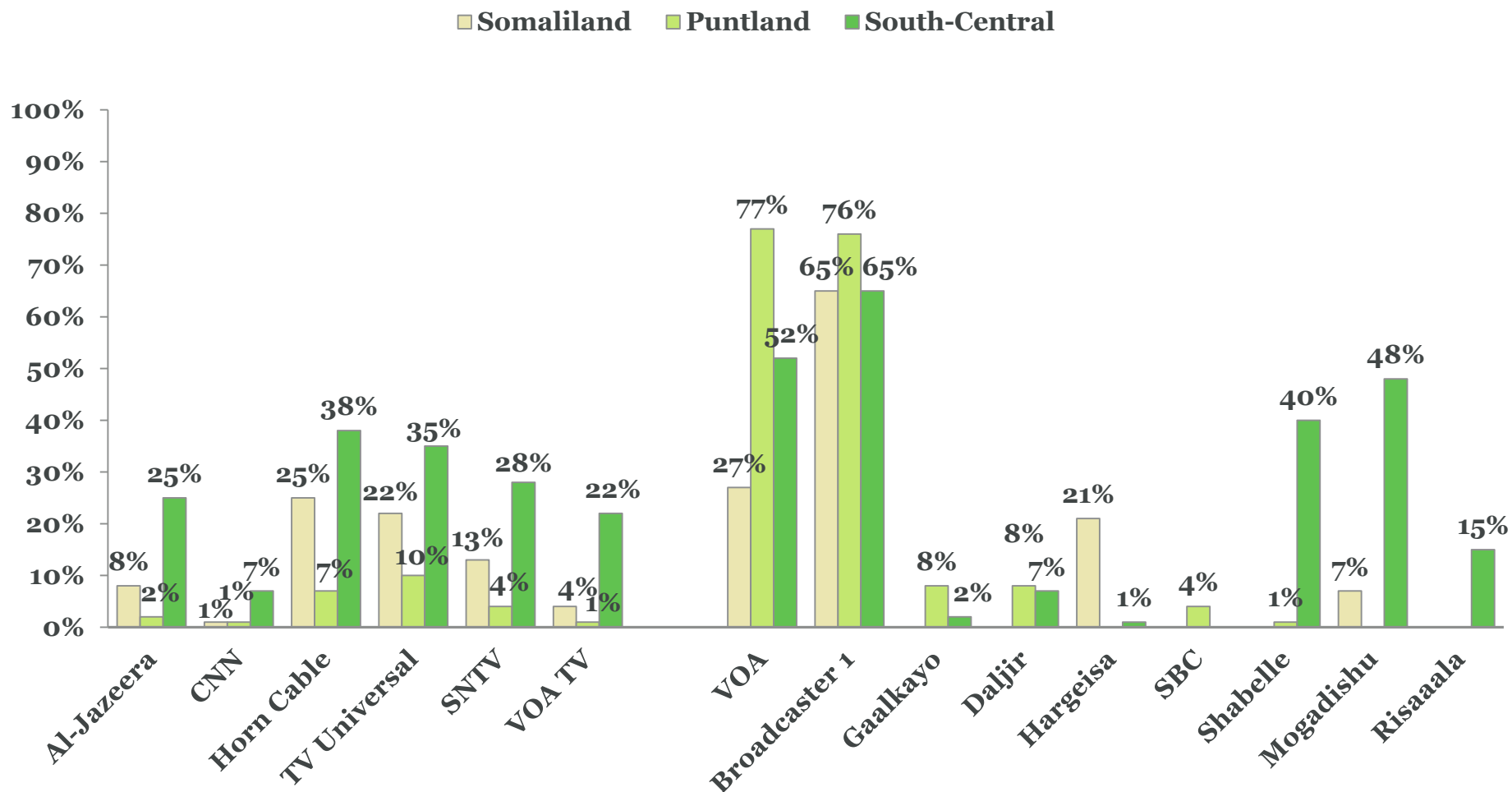
Usage of External Media

- Sophistication of media platforms doesn't translate into ready availability of quality journalism
- Extreme danger of practicing journalism in Somalia limits quality of local outlets
- Widespread use of technology suitable for external media access (satellite, Internet, some SW), coupled with paucity of good local alternatives, creates major role for international media

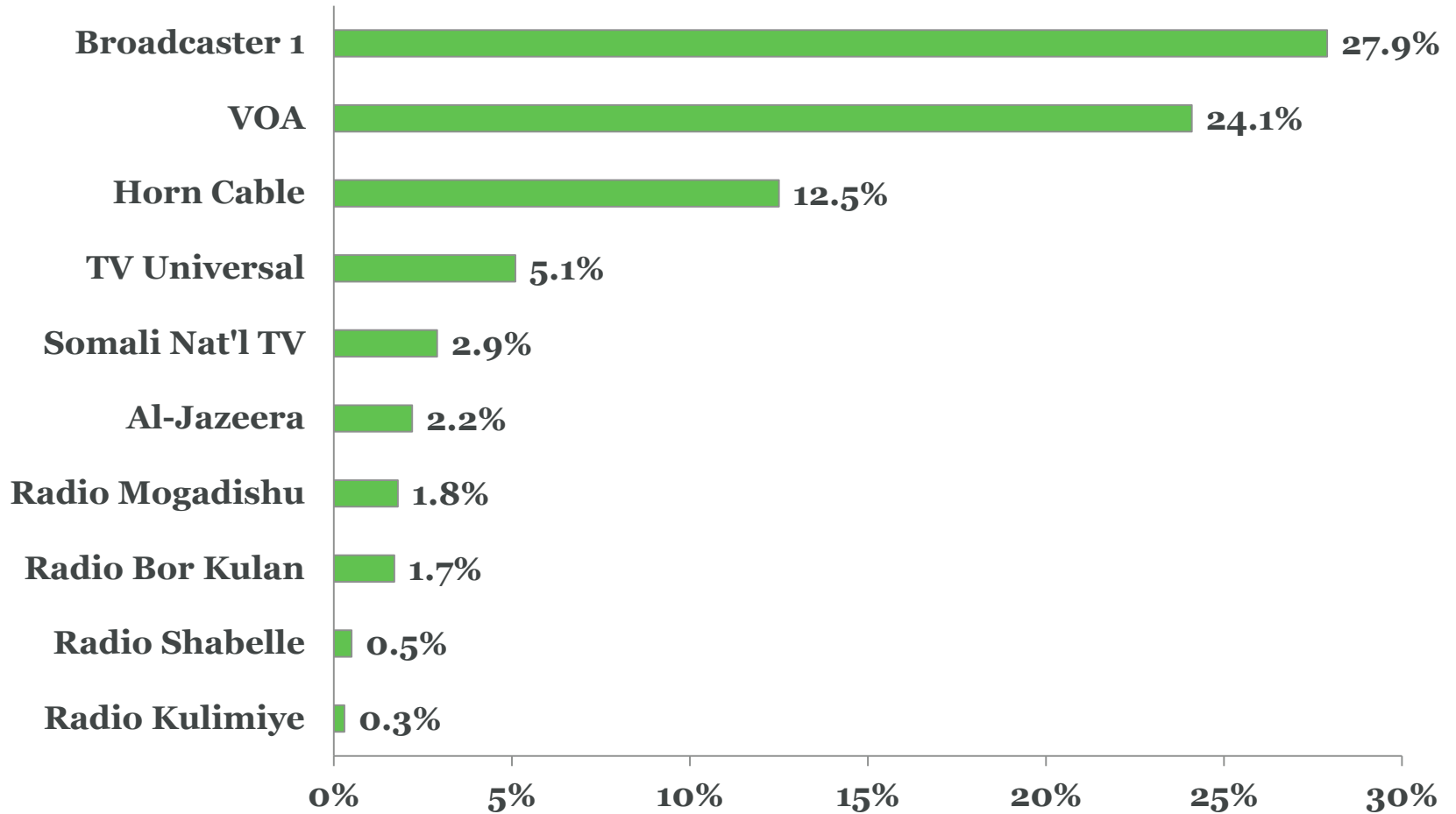
Past Week Audiences: National



Past Week Audiences: By Region



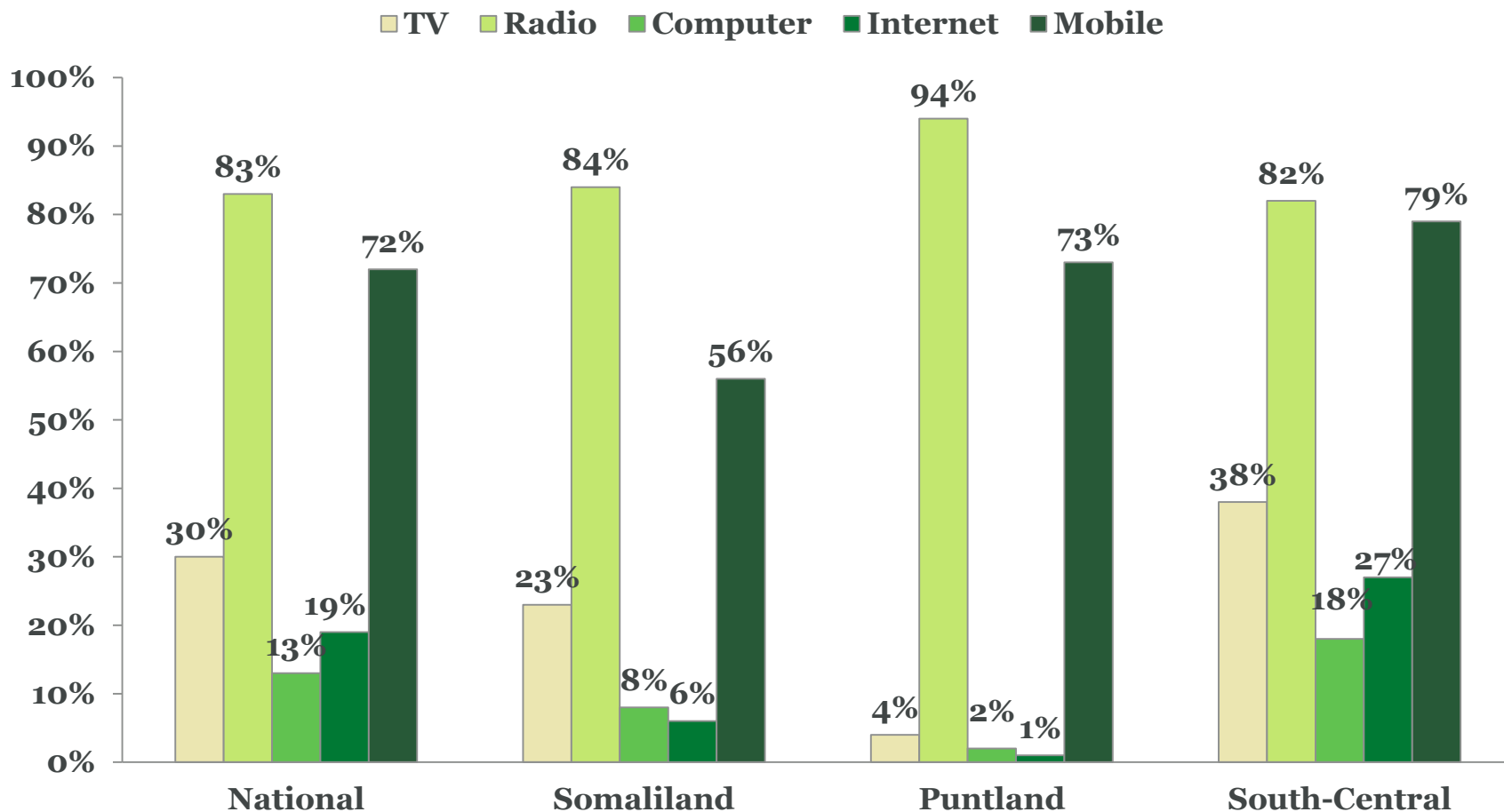
Most Important News Sources



Regional Distinctions

- Major distinctions between the three main regions: Somaliland, Puntland, South-Central
- Puntland is far behind in terms of TV and new media access; but radio is equally important everywhere
- VOA and Broadcaster 1 draw their biggest audiences in Puntland, perhaps due to lower levels of alternative media there
- Only in South-Central do local radios (Radio Mogadishu and Shabelle) come close to challenging international broadcasters

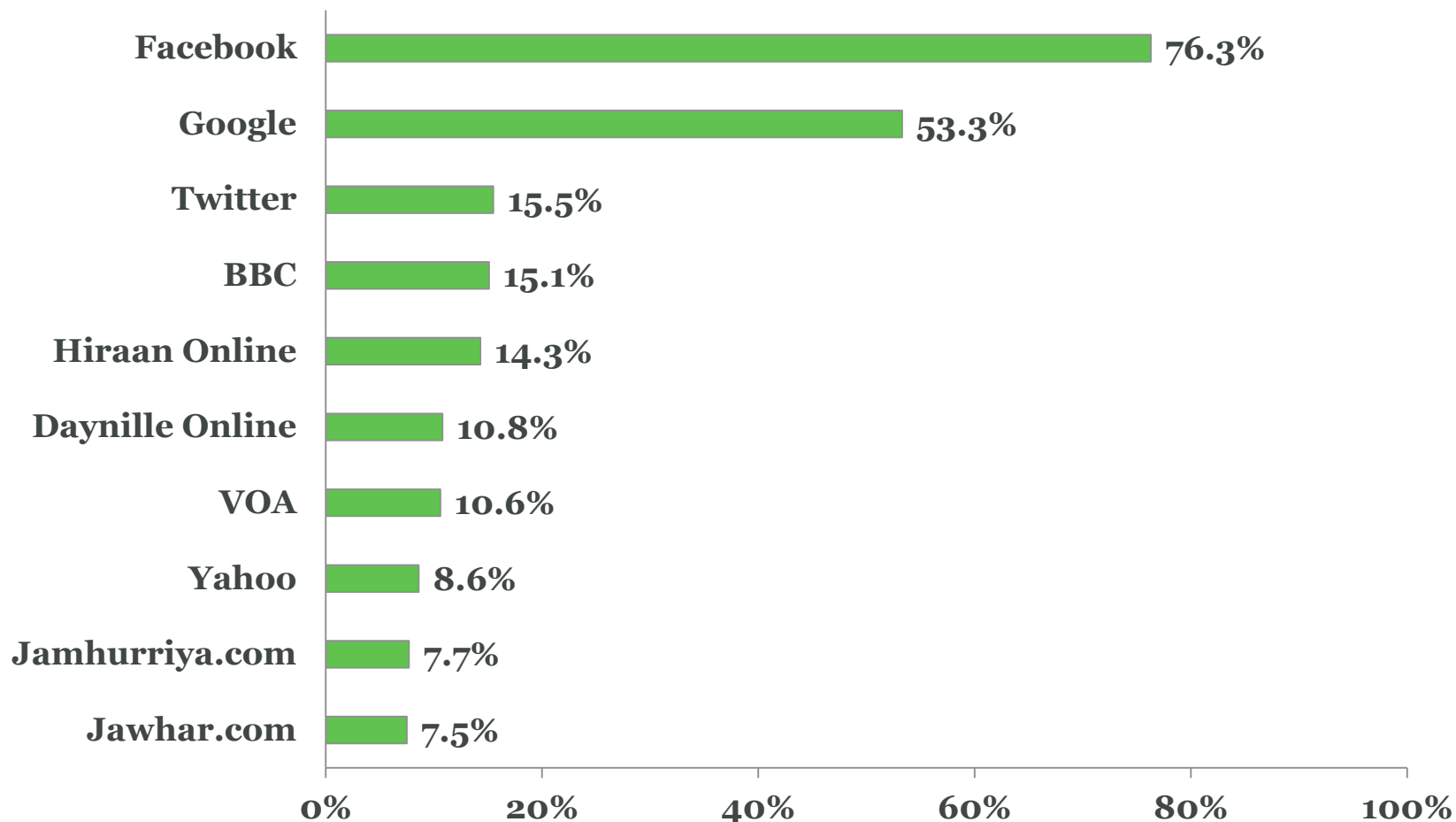
Media Ownership, by Region



Aspects of New Media Use

- Internet use for news very high in the African context, especially in South-Central Somalia
- Facebook use extremely widespread among Internet users, both in general and as information source
- A significant number of Somali language sites, both local and diaspora originated
- Heavy usage of mobile for Internet and other non-voice activities

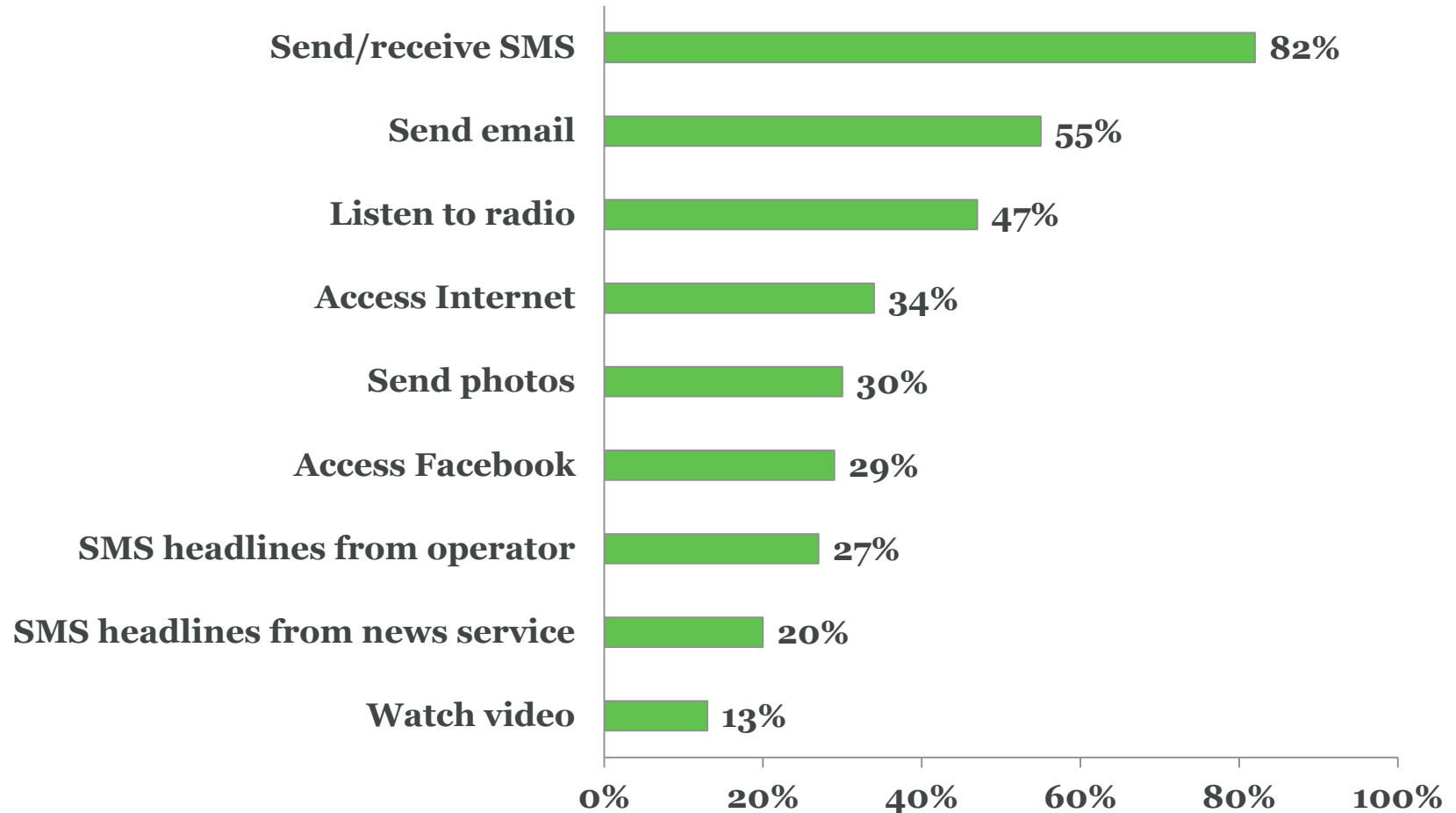
Most Important Internet Sites for News



Base: Past 12 months Internet users (n=609)

Mobile Phone Activities

(Activities performed on mobile in past 7 days)



Base: Mobile phone owners (n=1,447)

Strategic Considerations for Communicating With Somalis

- Role of foreign media remains extremely important
- Radio is still the most widely used news medium, across all regions
- Heavy access to and usage of alternative platforms opens up additional opportunities
- Any communications strategy must include digital and mobile, with potentially greater short-term payoff than elsewhere in Africa



GALLUP®



Upcoming BBG Research Series events:

- Wednesday, December 11: Vietnam

Learn more about the BBG Research series at <http://j.mp/UjCmJb>

Have a question? Contact us at 202-203-4400 or pubaff@bbg.gov

APPENDIX

Conducting Survey Research in Mali

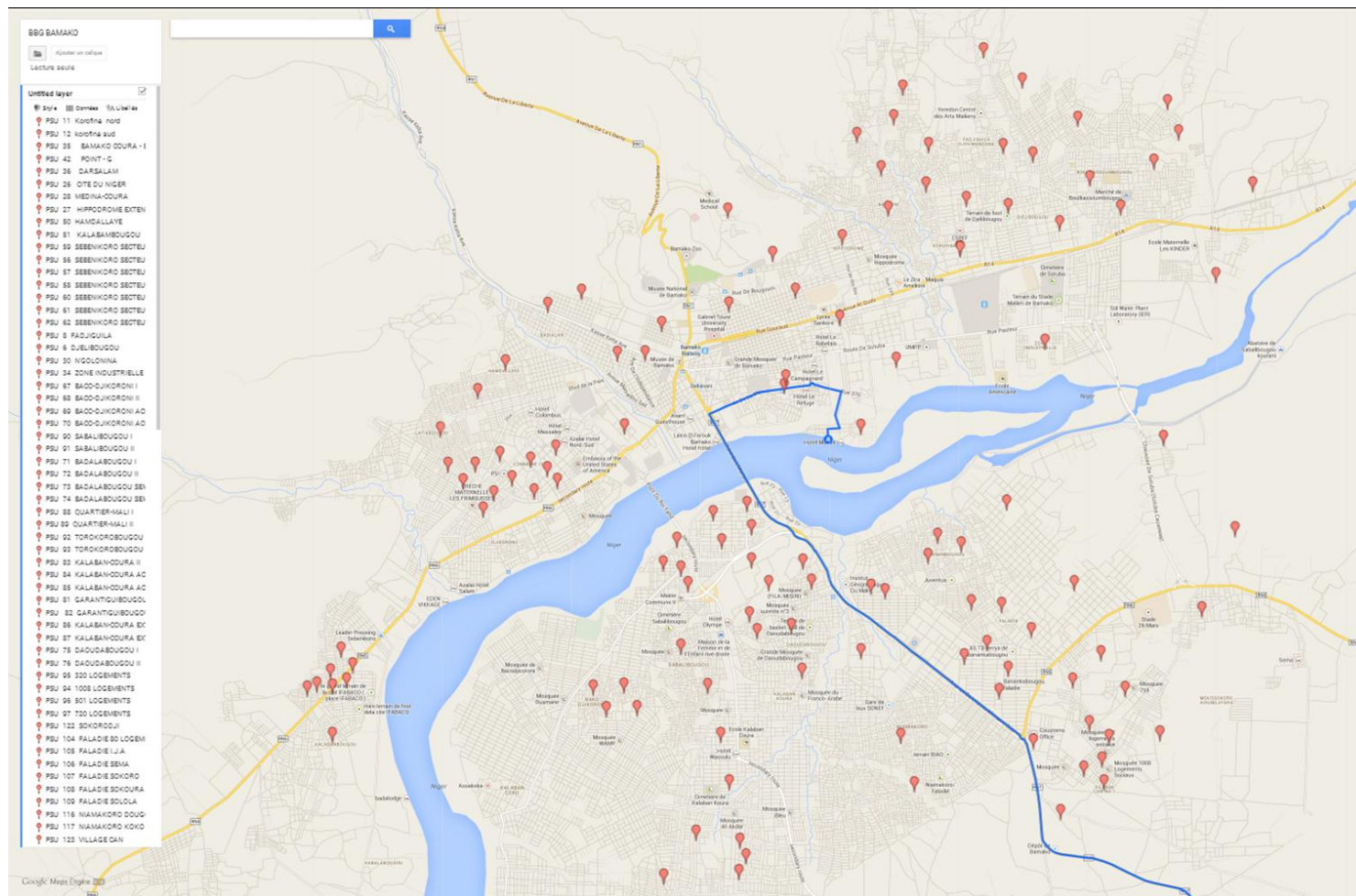
- Government authorization
- Approval period: 2 months
- Poor transportation infrastructure
- Difficulty of recruiting women to conduct fieldwork outside capital city



2012 Mali Surveys Conditions Comparison

	World Poll 2012	BBG Bamako
Field dates	October 22-November 3	December 7-16
Field staff	<ul style="list-style-type: none"> ▪ 36 (including supervisors), 2 national coordinators ▪ Number of women: 4 	<ul style="list-style-type: none"> ▪ 35 (including supervisors), 2 project coordinators ▪ Number of women: 5
Coverage	All regions, except Tombouctou, Gao, Kidal, and Mopti	Capital city only
Conditions	<ul style="list-style-type: none"> ▪ High-level government meeting to resolve the crisis in North Mali, but rebel attacks still occurred. ▪ Interviewers noticed respondents were more willing to participate in the survey this year. 	<ul style="list-style-type: none"> ▪ Three levels of authorization are used before sending interviewers through the city. ▪ Mali's PM, Cheick Modibo Diarra, is abducted by members of the military and forced to step down. ▪ Interviewers noticed respondents have become more suspicious.

Sampling points in Bamako – December 2012



Somalia Survey — Background and Conditions

- First nationally representative survey of Somalia
- Somali national territory split between three governments, multiple militias, Kenyan/Ethiopian forces, and al-Qaeda linked Islamist group al-Shabab at time of survey
- Sample size: 2,000
- Face-to-face survey
- Since 2009: 7 World Poll surveys in Somaliland of adults 15 and over

